Define the Opportunity Team

Overview

In this section, you will find information about the process to add an Account Manager in the Opportunity Team

Concerned profiles:

ALL opportunity owners

Table of content

Step By Step

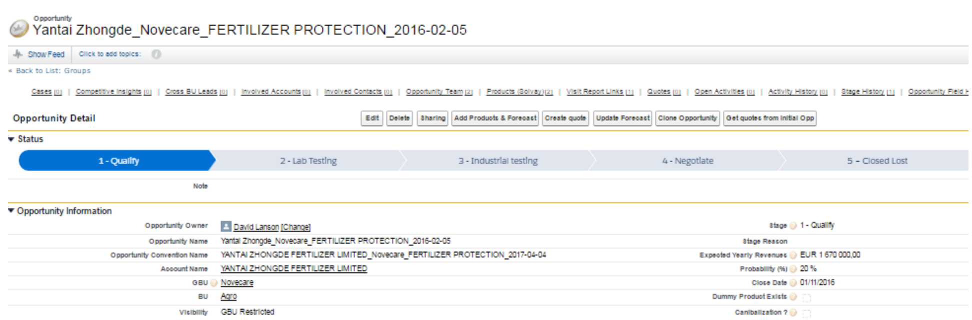
Opportunity Stages & Process Mapping

The "Qualify" stage gathers the following business activities

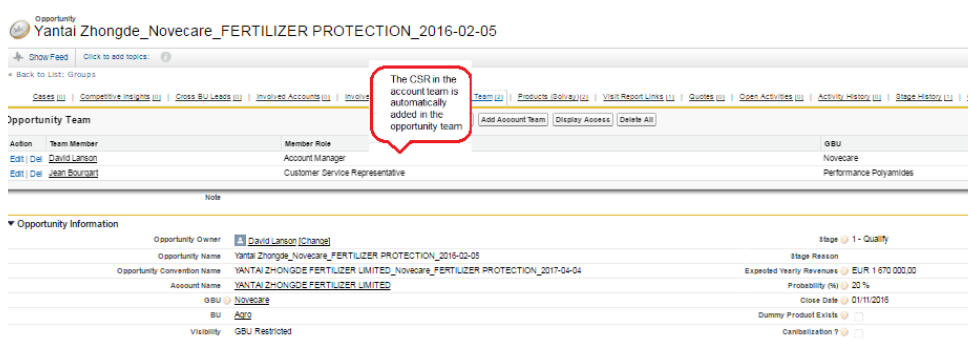
Business activity	Who?	How it translates in SFDC?
• Collection and analysis of Customer needs	Opportunity Owner	Opportunity
• Analyze context (contacts with decision power, influence, competition)	Opportunity Owner	Involved Contacts, Competitive insight
• Involve Team	Opportunity Owner	Opportunity Team
• Compare needs with existing product portfolio	Opportunity Owner + Technical Marketing	Opportunity Team + Team Roles
• First selection of product (s)	Opportunity Owner + Technical Marketing	Product
• Potential business assessment	Opportunity Owner	Potential Volume (Pipeline Forecasting)
• Scope assessment	Opportunity Owner	Market segmentation

Fill in the Opportunity Team

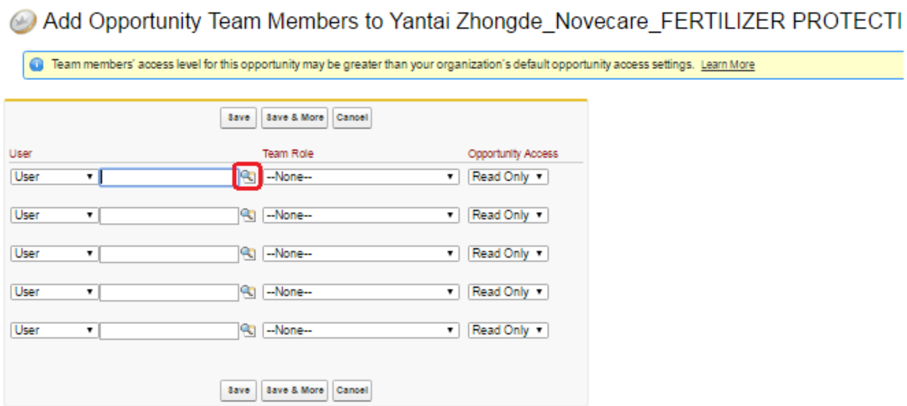
1 David *opens* his new **opportunity** for which he wants to add Pedro in the team



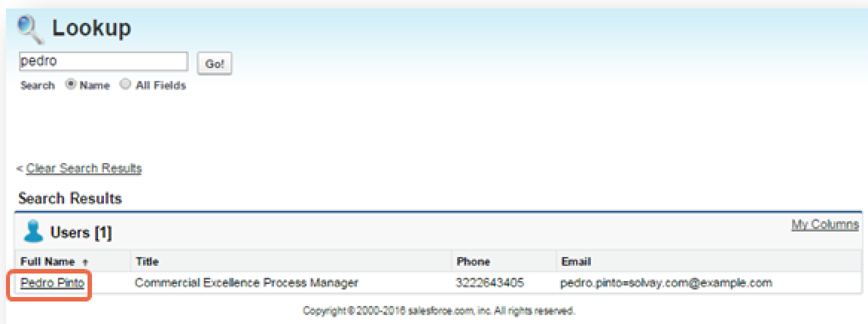
2 He *hoovers* the **Opportunity Team** and discovers he's already in the team! He now *clicks* on **Add** in order to add Pedro in the team



3 David must now *click* on the **look-up** to open the search windows

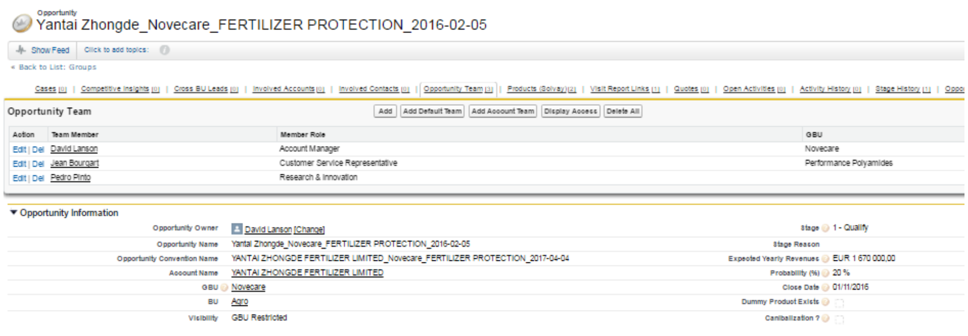


4 Once the window open, he *searches* for **Pedro** and *clicks* on Pedro's name



5 Before saving, David *defines* Pedro's role and Pedro's opportunity access. When he's finished, he *clicks* on **Save**.

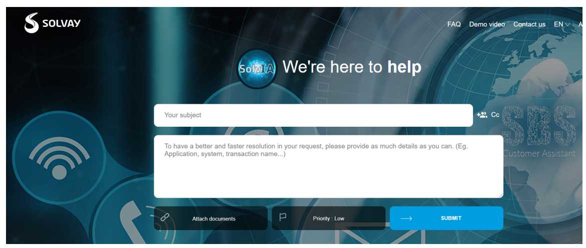
- Read / Write: gives the permission to the team members to edit the opportunity
- Read Only: gives visibility permission only

6 Roles are the following: Account Manager Key Account Manager Customer Service Representative Sales Support Business Development Technical Marketing Global Key Account Manager Research & Innovation Strategic Marketing	
7 It's done! David has added Pedro in the team.	
8 Pedro can now make the opportunity evolve and update some data	

Back to the top

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example

Related articles

- Definition, Objectives and Types of Opportunities
- Create a New Opportunity
- Clone an Existing Opportunity
- Follow the Opportunity Stages – Add Contacts in the Involved Contacts
- Follow the Opportunity Stages – Add Accounts in the Involved Accounts
- Negociate to win
- Close the Opportunity
- Competitive insights - Create a Competitive Insight
- Cross BU Leads – Create a Cross BU Lead
- Introduction to Quote Process Management