# 20. Cross BU Leads

***Managing Customer Needs***

## Overview

**In this section, you will find information about cross BU leads and how to create and update one in Salesforce.com.**

Key added value of using Cross BU Lead => Share business leads with colleagues from other GBU (X-GBU opportunities).

As a result, capitalize on cross-GBU collaboration to indentify new business opportunities for Solvay.

> A cross BU lead is an opportunity to share with another GBU/BU a business lead learned during an interaction with the market and that can potentially generate additional revenue for the Group.

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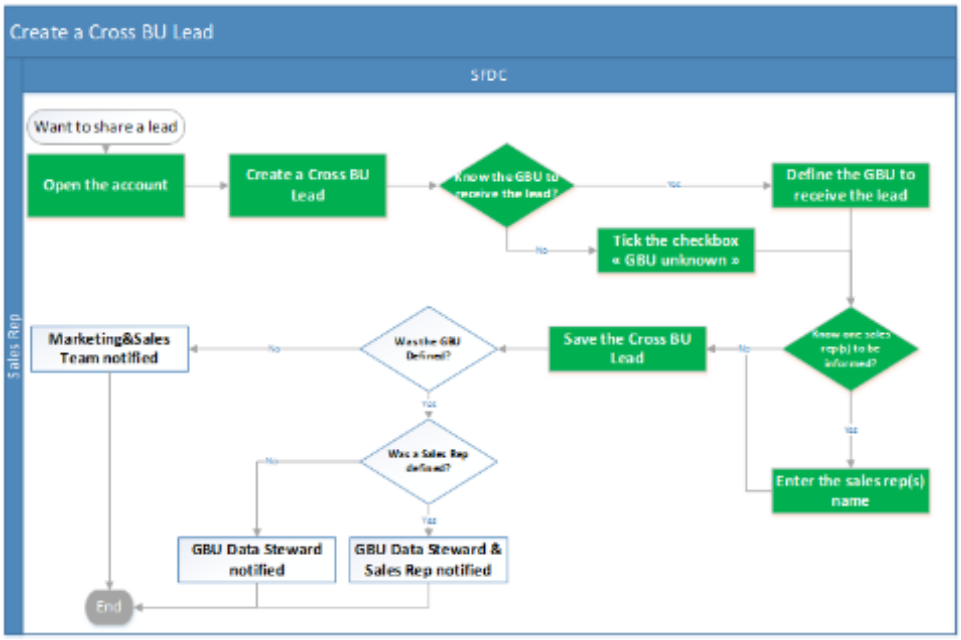
## Cross-BU Lead Rules

| | |
|---|---|
| **Who can create?** | Any sales can create a Cross BU Lead |
| **Who can see?** | Any sales can create a Cross BU Lead |
| **Who can update?** | Only the Cross BU Lead Owner can update a Cross BU Lead |
| **Who can delete?** | Only the System Administrator can delete a Cross BU Lead |

## Step By Step

### Cross-BU Lead Process Flow



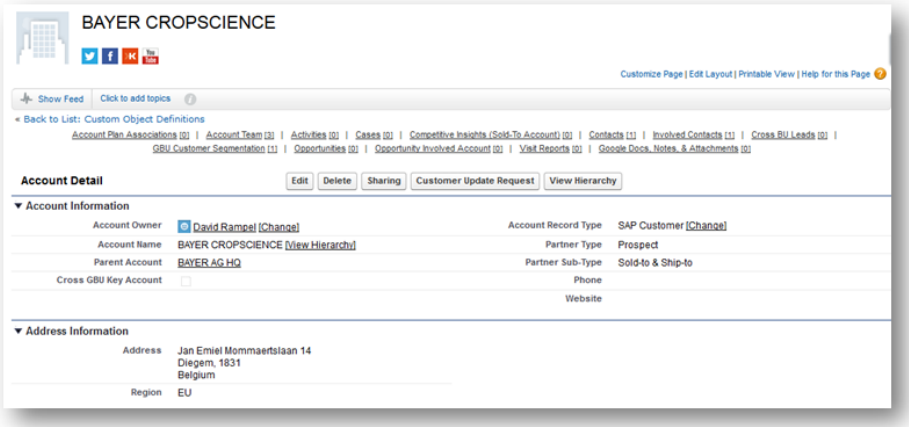

**Cross BU Lead Objectives**

• When visiting a customer, a Sales Rep is notified that this customer may have some business needs that could interest another BU from his GBU or even an other BU in another GBU

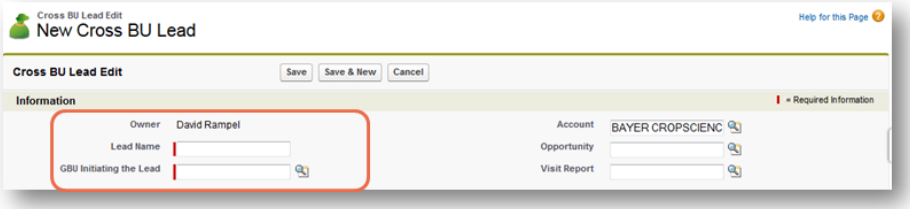
• Corporate Marketing & Sales receives some insights on a potential business opportunity and can notify the right GBU / BU

## Create a Cross BU Lead

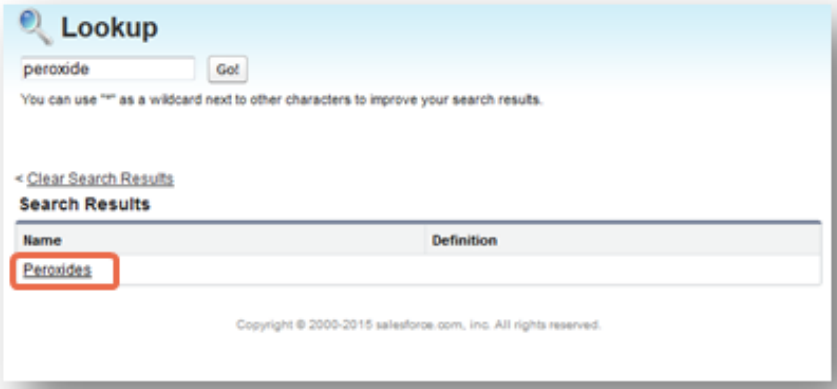
1 David *opens* the **account** for which he wants to create a Cross BU Lead.



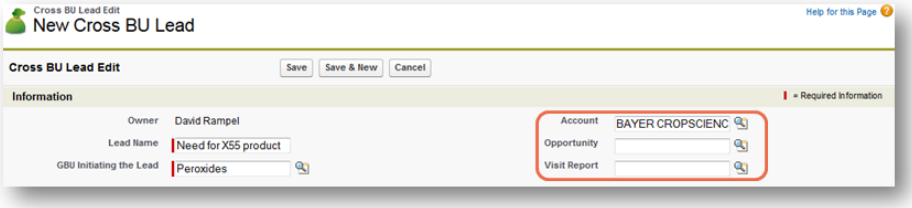

2 In the first section **Information**, David *enters* a **Lead Name.**



3 David *clicks* on the **lookup icon** and *searches* for his GBU to set it as **GBU Initiating** the lead. Once he finds it, he *c licks* on the **GBU name.**

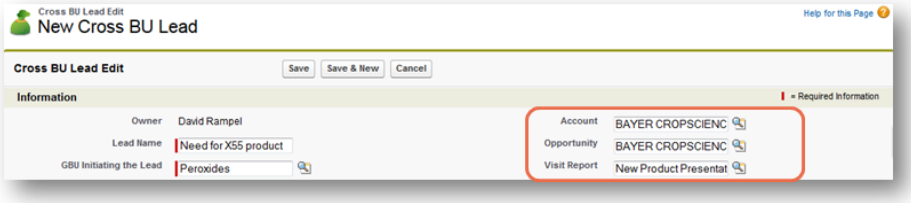



4 On the left side of the section, David *l inks* the **Cross BU Lead** to the **opportu nity** and to the **visit report** he previously created.

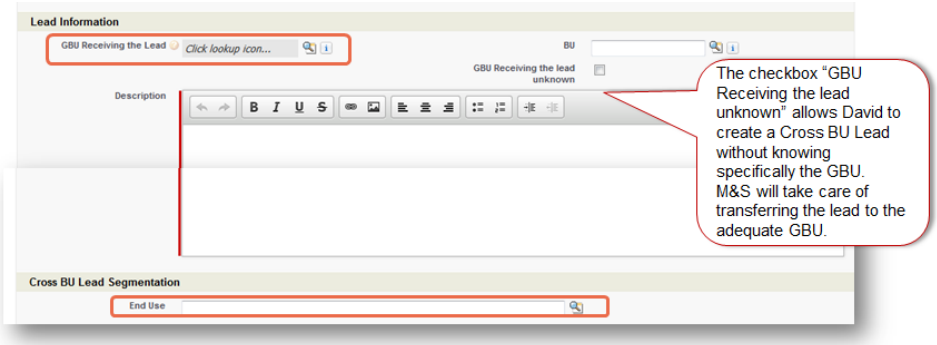



These links are not mandatory, but it's really helpful when consulting the visit report or the opportunity!

5 Once David *links* the Cross BU Lead to the 2 records, he can start filling in the details of the Cross BU Lead.

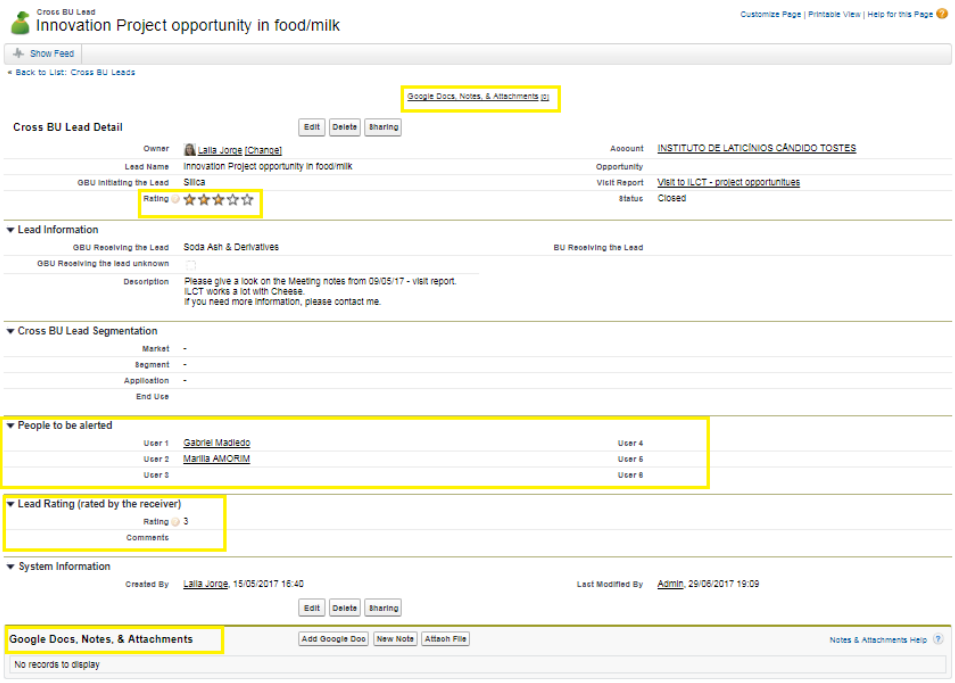



6 David *defines* to which **GBU** this lead must be addressed and *details* the context. He then *clicks* on **Save.**




In this big empty field, David can use rich text like bold, underlined, bullets, etc. to elaborate the description. Useful!

7 David has now finished.
Thanks for sharing this lead David!




**NEW**

Please take note of the **new fields & Related list** added in Release 6.

The sender can add more **"People to be alerted"** and the receiver has to complete the field **"Lead Rating".**

When a cross BU lead is created, my team receive an automatic email.

Dear User,

This automated email informs you that a Sales Lead was identified by Julien Andreoli from GBU Soda Ash & Derivatives.

Please find below the information related to this lead:

Lead Name: Lead test 2
Account: APOLLO TYRES LTD.
Account Country: India
Description : This is a test
Date Of Creation: 11/12/2017
Cross BU Lead URL: https://solvay-crm--dev.cs88.my.s...force.com/a0p9E000000rd8D

Kindly relay this information to the team in charge

Kind regards,
Julien Andreoli

The country of the account is now displayed in the automatic notification email generated after cross GBU lead creation.

8 In the mean time, the GBU has received an alert with the lead details.

The GBU will take care of assigning the lead. It's so easy to share good tips!

SOLVAY

asking more from chemistry®

Dear Herman Wijns,

This automated email informs you that a Sales Lead was identified by Need for X55 product from GBU Novecare.

Please find below the information related to this lead:

Lead Name : Need for X55 product

Account : BAYER CROPSCIENCE SRL

Description : Just heard from John that Dupont was short for delivering their products. Potential interest to call her for proposing Novecare products...

Date Of Creation: 17/07/2015

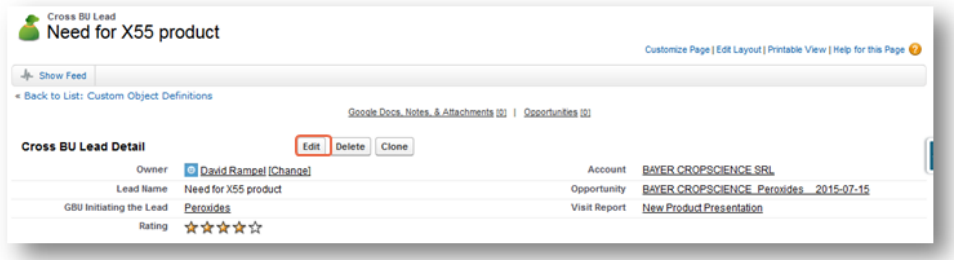
Kindly relay this information to the team in charge of this Account.

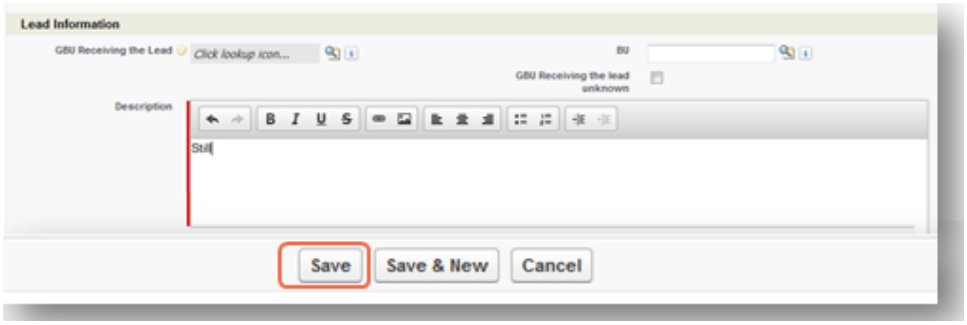
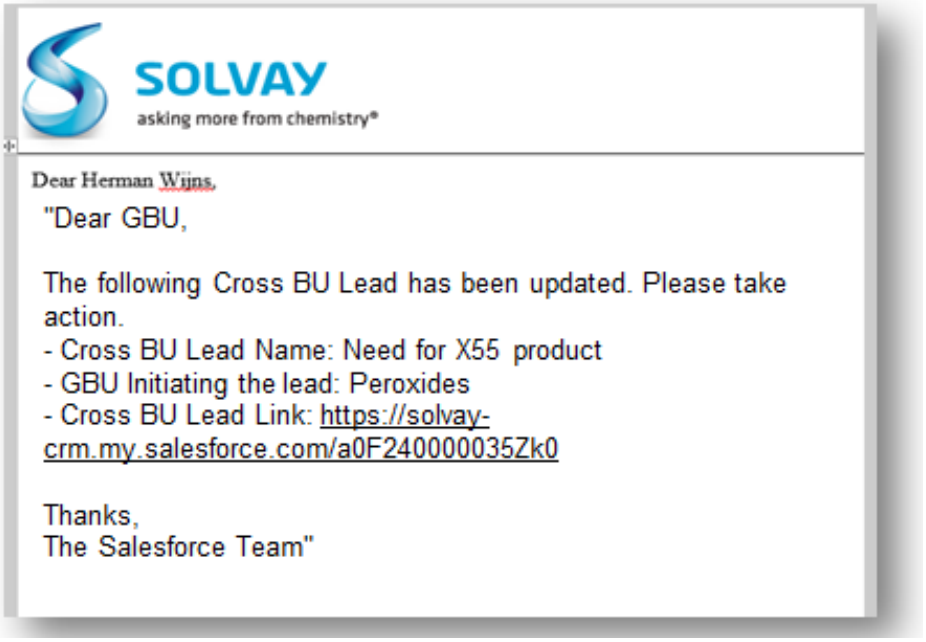
Kind regards,

David Rampel

## Modify a Cross BU Lead

1 David received more information and would like to *upd ate* his lead.
He clicks on **Edit** button.



| | |
|---|---|
| 2 Then he *updates* the **description** and clicks on **Save.** |  <br>Attention! Only David (creator) and the users from the GBU receiving the lead can update it. |
| 3 Once the modification is done, a *notification email* is sent to the GBU receiving the lead, to alert them about the change. |  |

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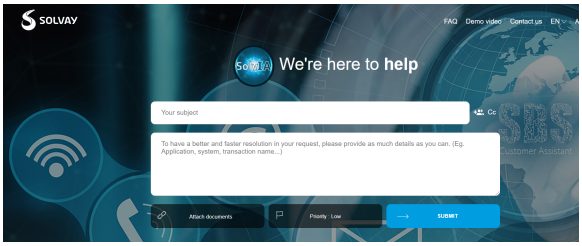
## Related articles

- Create a New Opportunity
- Clone an Existing Opportunity
- Close the Opportunity
- Visit Report: Confidentiality management & Visit report wizard

## 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*