

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](https://www.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 identify 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.

Table of content

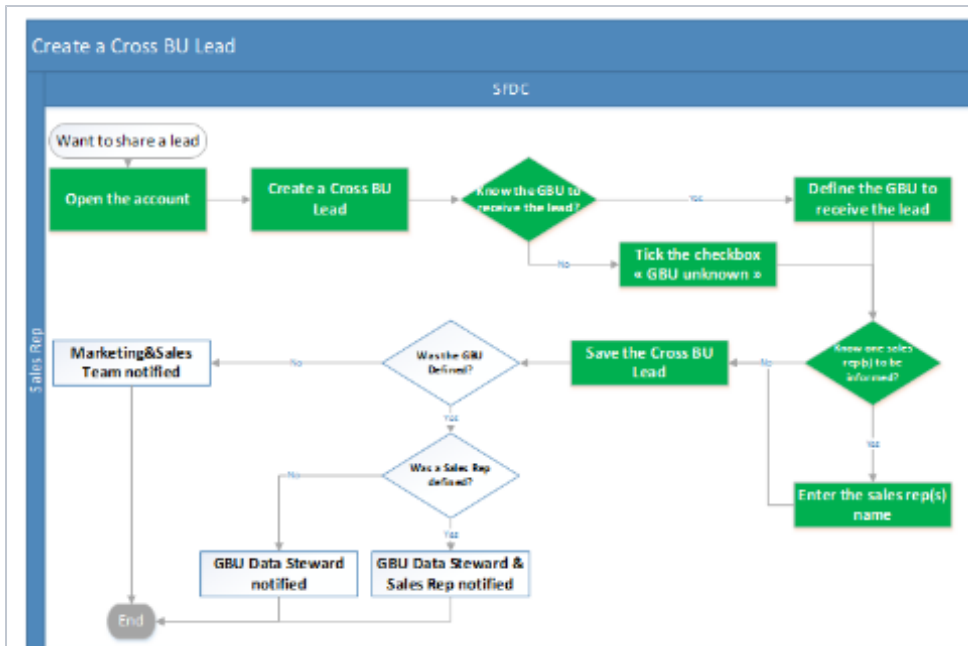
- [Cross-BU Lead Rules](#)
- [Step By Step](#)
 - [Cross-BU Lead Process Flow](#)
 - [Create a Cross BU Lead](#)
 - [Modify a Cross BU Lead](#)
- [Related articles](#)
- [Need help?](#)

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

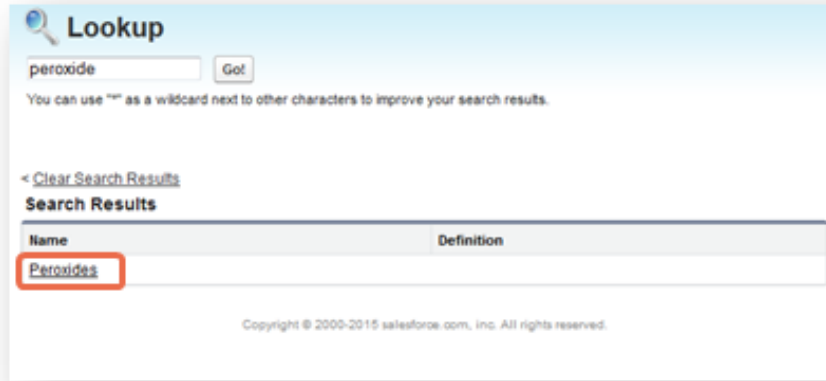
1 David opens the **account** for which he wants to create a Cross BU Lead.

The screenshot shows the account detail page for 'BAYER CROPSCIENCE'. It includes navigation links like 'Show Feed' and 'Click to add topics'. Below the navigation, there are tabs for 'Account Detail', 'Edit', 'Delete', 'Sharing', 'Customer Update Request', and 'View Hierarchy'. The 'Account Information' section displays fields for Account Owner (David Rampel), Account Name (BAYER CROPSCIENCE), Parent Account (BAYER AG HQ), and Cross GBU Key Account. The 'Address Information' section shows the address: Jan Emiel Mommaertsstraat 14, Diegem, 1831, Belgium, with Region EU.

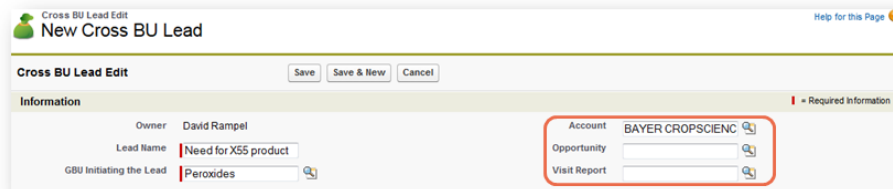
2 In the first section **Information**, David enters a **Lead Name**.

The screenshot shows the 'New Cross BU Lead' form. It has a title bar 'Cross BU Lead Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. The 'Information' section contains several fields: Owner (David Rampel), Lead Name (with a red box around the input field), GBU Initiating the Lead (with a red box around the input field), Account (BAYER CROPSCIENC), Opportunity, and Visit Report. A red bar at the bottom right indicates 'Required Information'.

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 *clicks* on the **GBU name**.

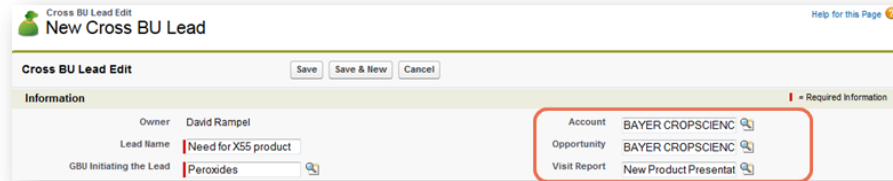


4 On the left side of the section, David *links* the **Cross BU Lead** to the **opportunity** and to the **visit report** he previously created.

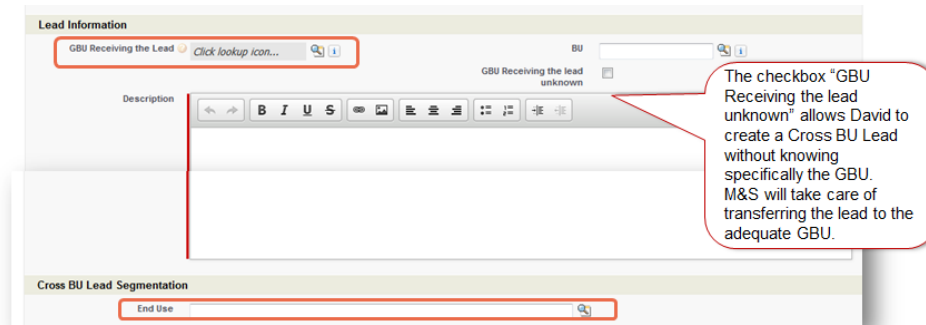


✔ These links are not mandatory, but it's really helpful when consulting the visit report or the opportunity!

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!

Cross BU Lead
Innovation Project opportunity in food/milk

Customize Page | Printable View | Help for this Page

Show Feed

Back to List: Cross BU Leads

Google Docs, Notes, & Attachments

Cross BU Lead Detail

Owner: [Lalla Jones](#) (Change)

Account: INSTITUTO DE LATICÍNIOS CÁNDIDO TOSTES

Lead Name: Innovation Project opportunity in food/milk

Opportunity: Visit Report: [Visit to ILCT - project opportunities](#)

GBU Initiating the Lead: [Slica](#)

Status: Closed

Rating: ☆☆☆☆

Lead Information

GBU Receiving the Lead: Soda Ash & Derivatives

BU Receiving the Lead:

Description: Please give a look on the Meeting notes from 09/05/17 - visit report. ILCT works a lot with Cheese. If you need more information, please contact me.

Cross BU Lead Segmentation

Market: -

Segment: -

Application: -

End Use:

People to be alerted

User 1	Gabriel Madruga	User 4
User 2	Marilia AMORIM	User 5
User 3		User 6
		User 8

Lead Rating (rated by the receiver)

Rating: 3

Comments:

System Information

Created By: [Lalla Jones](#) 15/05/2017 16:40

Last Modified By: [Admin](#) 29/06/2017 19:09

Google Docs, Notes, & Attachments

Add Google Doc | New Note | Attach File

Notes & Attachments Help

No records to display

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.salesforce.com/a0p9E00000rd8D>

Kindly relay this information to the team in charge

Kind regards,
 Julien Andreoli

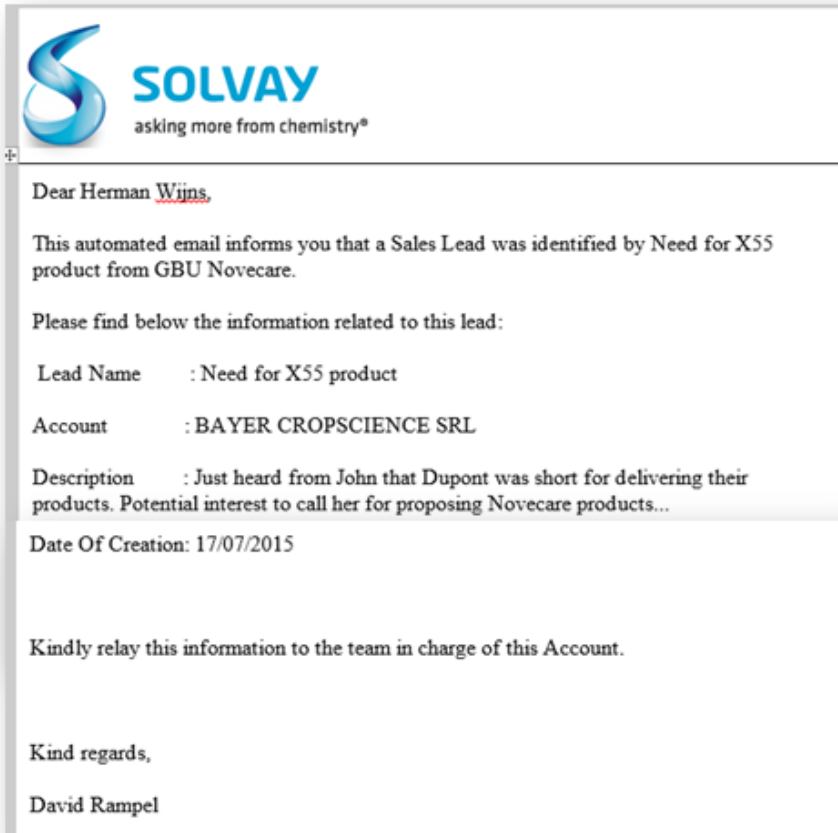
The country of the account is now displayed in the automatic notification email generated after cross GBU lead creation.

8

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



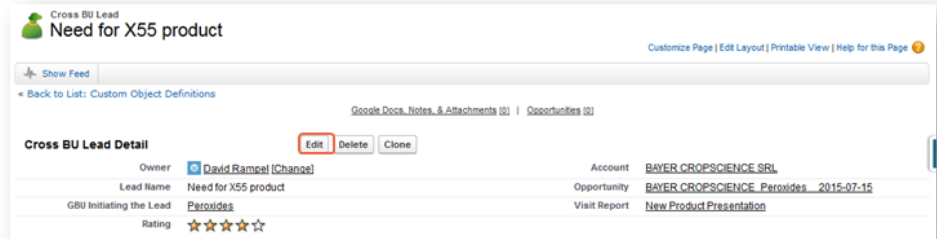
The GBU will take care of assigning the lead. It's so easy to share good tips!



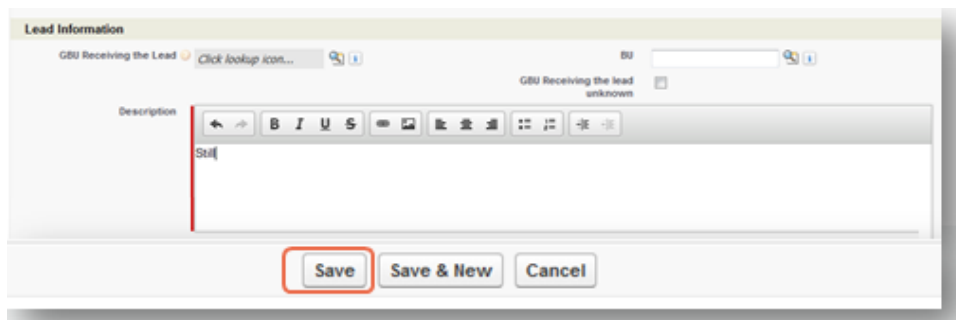
Modify a Cross BU Lead


1

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

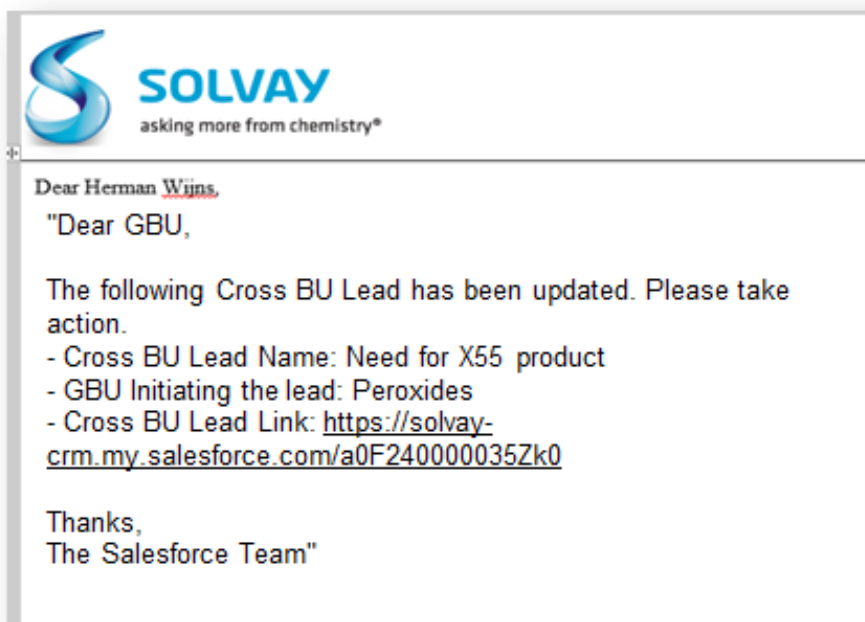


2 Then he *updates* the **description** and clicks on **Save**.



 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.



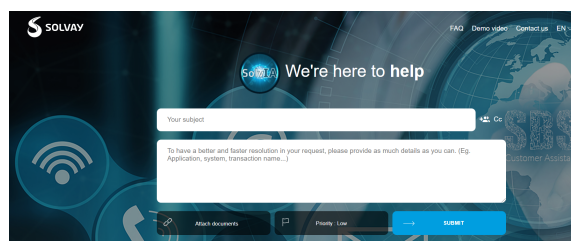
[Back to the top](#)

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