

# 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

## Step By Step

## Table of content

- [Step By Step](#)
  - [Opportunity Stages & Process Mapping](#)
  - [Fill in the Opportunity Team](#)
- [Related articles](#)
- [Need help?](#)

### Opportunity Stages & Process Mapping

The “Qualify” stage gathers the following business activities

| 1 - Qualify                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 2 - Lab Testing                         | 3 - Industrial testing                  | 4 - Negotiate              | 5 - Closed Lost                             | Won               |             |                                                                          |                   |                                        |                |                   |                  |                                                 |                                         |                               |                                  |                                         |         |                                 |                   |                                         |                    |                   |                     |  |  |  |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------|----------------------------|---------------------------------------------|-------------------|-------------|--------------------------------------------------------------------------|-------------------|----------------------------------------|----------------|-------------------|------------------|-------------------------------------------------|-----------------------------------------|-------------------------------|----------------------------------|-----------------------------------------|---------|---------------------------------|-------------------|-----------------------------------------|--------------------|-------------------|---------------------|--|--|--|--|--|
| <table><thead><tr><th>Business activity</th><th>Who?</th><th>How it translates in SFDC?</th></tr></thead><tbody><tr><td>• Collection and analysis of Customer needs</td><td>Opportunity Owner</td><td>Opportunity</td></tr><tr><td>• Analyze context (contacts with decision power, influence, competition)</td><td>Opportunity Owner</td><td>Involved Contacts, Competitive insight</td></tr><tr><td>• Involve Team</td><td>Opportunity Owner</td><td>Opportunity Team</td></tr><tr><td>• Compare needs with existing product portfolio</td><td>Opportunity Owner + Technical Marketing</td><td>Opportunity Team + Team Roles</td></tr><tr><td>• First selection of product (s)</td><td>Opportunity Owner + Technical Marketing</td><td>Product</td></tr><tr><td>• Potential business assessment</td><td>Opportunity Owner</td><td>Potential Volume (Pipeline Forecasting)</td></tr><tr><td>• Scope assessment</td><td>Opportunity Owner</td><td>Market segmentation</td></tr></tbody></table> | 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 |  |  |  |  |  |
| 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

Opportunity

Yantai Zhongde\_Novocare\_FERTILIZER PROTECTION\_2016-02-05

Back to List: Groups

CasesCompetitive insightsCross Bu LeadsInvolved AccountsInvolved ContactsOpportunity TeamProducts & ForecastVisit ReportVisitsQuotesOpen ActivitiesActivity HistoryStage HistoryOpportunity Feed

Opportunity Detail

1 - Qualify

Opportunity Information

Opportunity Owner: David Larson (Change)

Opportunity Name: Yantai Zhongde\_Novocare\_FERTILIZER PROTECTION\_2016-02-05

Opportunity Convention Name: YANTAI ZHONGDE FERTILIZER LIMITED\_Novocare\_FERTILIZER PROTECTION\_2017-04-04

Account Name: YANTAI ZHONGDE FERTILIZER LIMITED

GBU: Novocare

BU: AGG

Visibility: GBU Restricted

Stage: 1 - Qualify

Stage Reason: Expected Yearly Revenues: EUR 1 670 000.00

Probability (M): 20 %

Close Date: 01/11/2016

Dummy Product Exists: ☐

Cartelization: ☐

2

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

Opportunity

Yantai Zhongde\_Novocare\_FERTILIZER PROTECTION\_2016-02-05

Back to List: Groups

CasesCompetitive insightsCross Bu LeadsInvolved AccountsInvolved ContactsTeamProducts & ForecastVisit ReportVisitsQuotesOpen ActivitiesActivity HistoryStage HistoryOpportunity Feed

Opportunity Team

Team

Opportunity Information

Opportunity Owner: David Larson (Change)

Opportunity Name: Yantai Zhongde\_Novocare\_FERTILIZER PROTECTION\_2016-02-05

Opportunity Convention Name: YANTAI ZHONGDE FERTILIZER LIMITED\_Novocare\_FERTILIZER PROTECTION\_2017-04-04

Account Name: YANTAI ZHONGDE FERTILIZER LIMITED

GBU: Novocare

BU: AGG

Visibility: GBU Restricted

Stage: 1 - Qualify

Stage Reason: Expected Yearly Revenues: EUR 1 670 000.00

Probability (M): 20 %

Close Date: 01/11/2016

Dummy Product Exists: ☐

Cartelization: ☐

3

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

### Add Opportunity Team Members to Yantai Zhongde\_Novecare\_FERTILIZER PROTECTI

Team members' access level for this opportunity may be greater than your organization's default opportunity access settings. [Learn More](#)

Save Save & More Cancel

| User   | Team Role | Opportunity Access |
|--------|-----------|--------------------|
| User ▼ | --None--  | Read Only ▼        |
| User ▼ | --None--  | Read Only ▼        |
| User ▼ | --None--  | Read Only ▼        |
| User ▼ | --None--  | Read Only ▼        |
| User ▼ | --None--  | Read Only ▼        |

Save Save & More Cancel

4

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

Lookup

pedro Go!

Search Name All Fields

< Clear Search Results

Search Results

Users [1] My Columns

| Full Name   | Title                                 | Phone      | Email                              |
|-------------|---------------------------------------|------------|------------------------------------|
| Pedro Pinto | Commercial Excellence Process Manager | 3222643405 | pedro.pinto=solvay.com@example.com |

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5

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

### Add Opportunity Team Members to Yantai Zhongde\_Novecare\_FERTILIZER

Team members' access level for this opportunity may be greater than your organization's default opportunity access settings. [Learn More](#)

Save Save & More Cancel

| User               | Team Role | Opportunity Access |
|--------------------|-----------|--------------------|
| User ▼ Pedro Pinto | --None--  | Read Only ▼        |
| User ▼             | --None--  | Read Only ▼        |
| User ▼             | --None--  | Read Only ▼        |
| User ▼             | --None--  | Read Only ▼        |
| User ▼             | --None--  | Read Only ▼        |

Save Save & More Cancel



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                 | Technical Marketing        |
| Key Account Manager             | Global Key Account Manager |
| Customer Service Representative | Research & Innovation      |
| Sales Support                   | Strategic Marketing        |
| Business Development            |                            |

7

It's done! David has added Pedro in the team.

8

Pedro can now make the opportunity evolve and update some data

Opportunity  
Yantai Zhongde\_Novocare\_FERTILIZER PROTECTION\_2016-02-05

Show Feed Click to add topics: ?

Back to List: Groups

Stages Competitive Insights Cross BU Leads Involved Accounts Involved Contacts Opportunity Team Products Solvia Visit Report Links Quotes Open Activities Activity History Stage History Close

Opportunity Team

| Action   | Team Member   | Member Role                     | GBU                    |
|----------|---------------|---------------------------------|------------------------|
| Edit Del | David Lajoux  | Account Manager                 | Novocare               |
| Edit Del | Jean Bourquet | Customer Service Representative | Performance Polyamides |
| Edit Del | Pedro Pinto   | Research & Innovation           |                        |

▼ Opportunity Information

|                             |                                                                             |  |  |
|-----------------------------|-----------------------------------------------------------------------------|--|--|
| Opportunity Owner           | David Lajoux [Change]                                                       |  |  |
| Opportunity Name            | Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05                    |  |  |
| Opportunity Convention Name | YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_FERTILIZER PROTECTION_2017-04-04 |  |  |
| Account Name                | YANTAI ZHONGDE FERTILIZER LIMITED                                           |  |  |
| GBU                         | Novocare                                                                    |  |  |
| BU                          | Agro                                                                        |  |  |
| Visibility                  | GBU Restricted                                                              |  |  |
| Stage                       | 1 - Qualify                                                                 |  |  |
| Stage Reason                |                                                                             |  |  |
| Expected Yearly Revenues    | EUR 1 670 000.00                                                            |  |  |
| Probability (%)             | 20 %                                                                        |  |  |
| Close Date                  | 01/11/2016                                                                  |  |  |
| Dummy Product Exists        | <input type="checkbox"/>                                                    |  |  |
| Cartelization ?             | <input type="checkbox"/>                                                    |  |  |

[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](#)
- [Negotiate to win](#)
- [Close the Opportunity](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [Introduction to Quote Process Management](#)