

20. Cross BU Leads

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.



Managing Customer Needs

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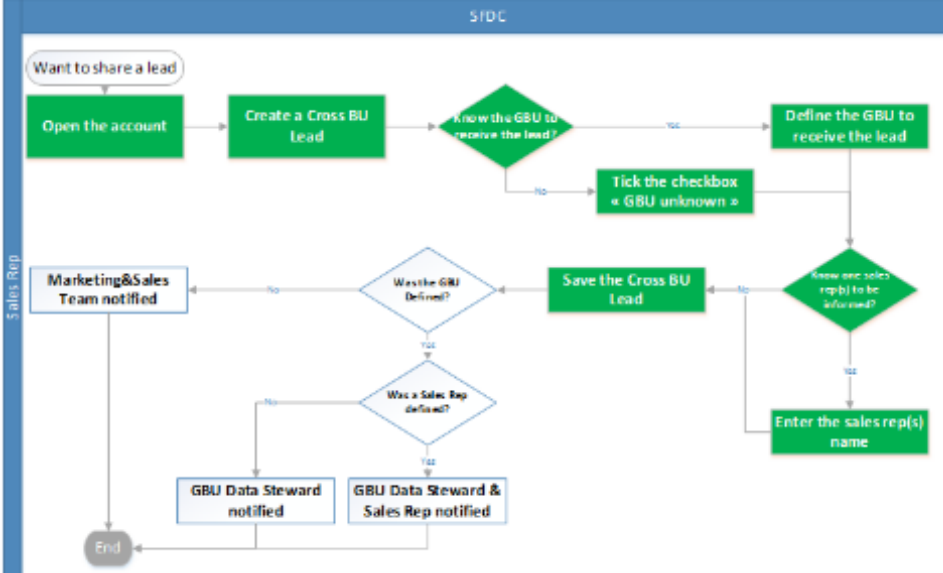
Cross-BU Lead Rules

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

Create a Cross BU Lead



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

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

- 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 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**.

The checkbox "GBU Receiving the lead unknown" allows David to create a Cross BU Lead without knowing specifically the GBU. M&S will take care of transferring the lead to the adequate GBU.

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

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Cross BU Lead Detail

Owner

Lalla Jorge (Change)

Account

INSTITUTO DE LATICINIOS CÁNDIDO TOSTES

Lead Name

Innovation Project opportunity in food/milk

Opportunity

Visit to ILCT - project opportunities

GBU Initiating the Lead

Silca

Visit Report

Visit to ILCT - project opportunities

Rating

☆☆☆☆☆

Status

Closed

Lead Information

GBU Receiving the Lead

Soda Ash & Derivatives

BU Receiving the Lead

GBU Receiving the lead unknown

Description

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

Cross BU Lead Segmentation

Market

-

Segment

-

Application

-

End Use

People to be alerted

User 1

Gabriel Madrido

User 4

User 2

Martina AMORIM

User 5

User 3

User 6

Lead Rating (rated by the receiver)

Rating

3

Comments

System Information

Created By

Lalla Jorge

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/a0p9E000000rd8D>

Kindly relay this information to the team in charge

Kind regards,
Julien Andreoli

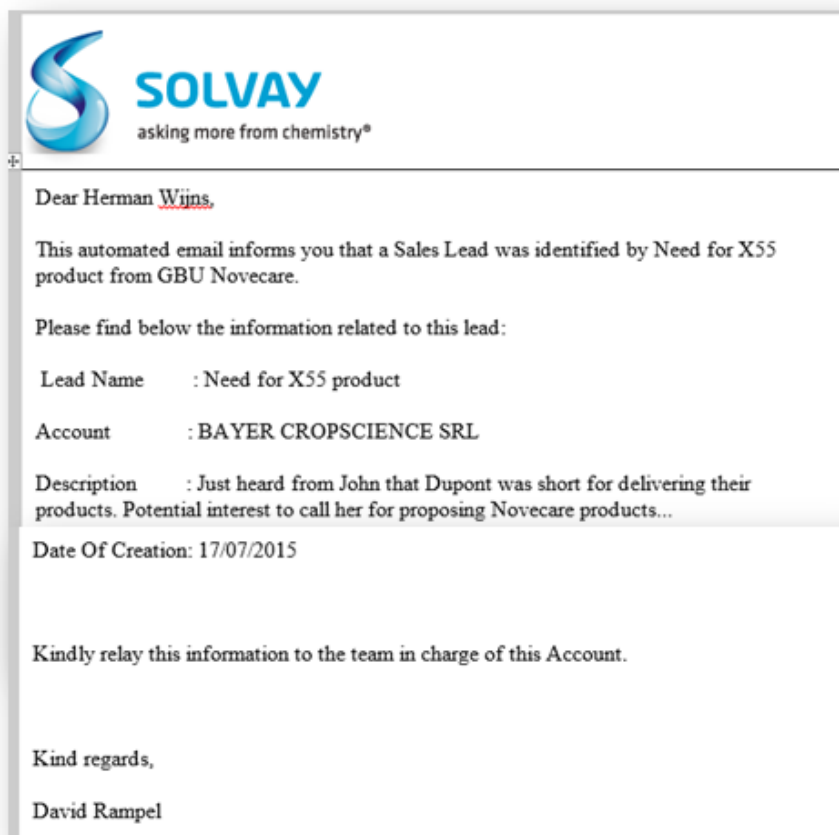
The country of the account is now displayed in the automatic notification email generated after cross GBU lead creation.

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



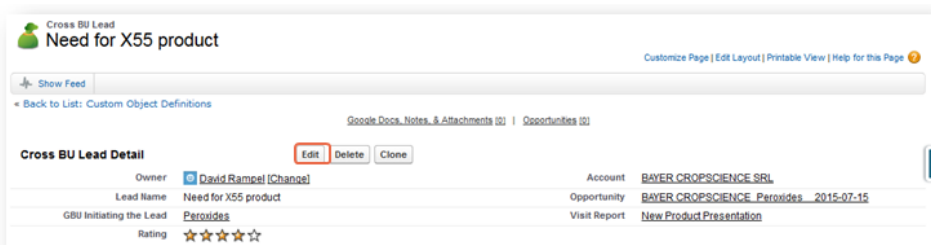
The GBU will take care of assigning the lead. It's so easy to share good tips!

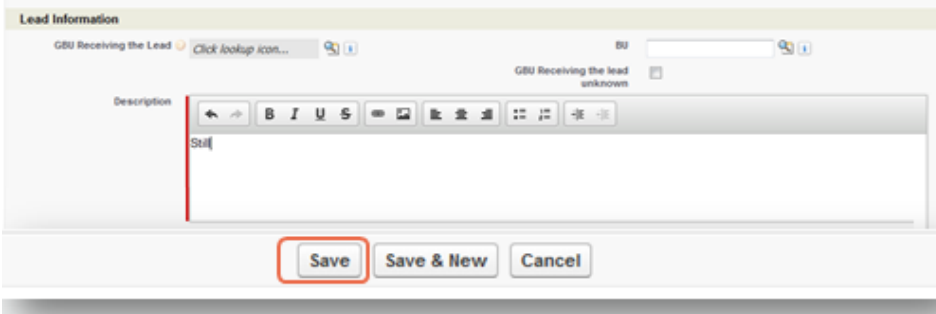
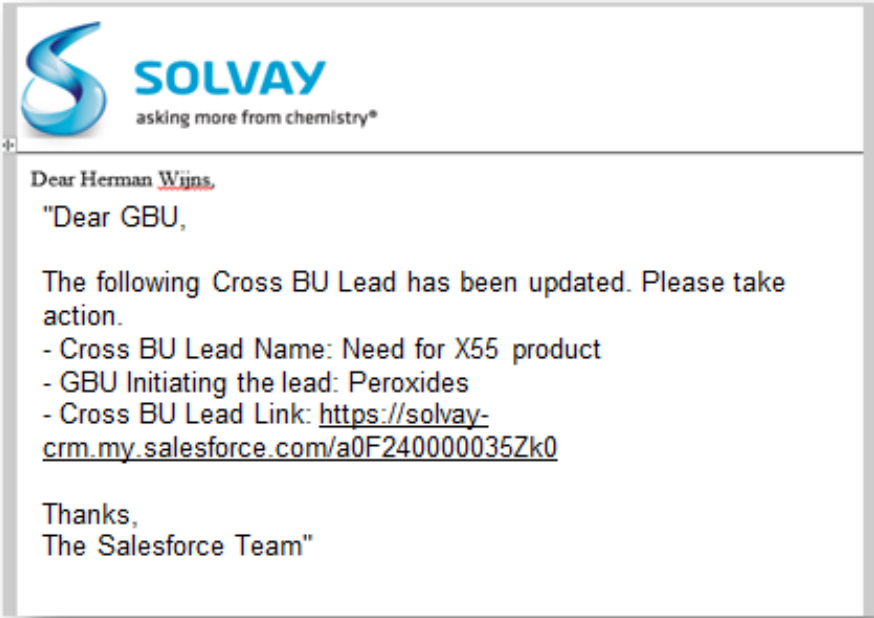


Modify a Cross BU Lead

1

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



2 Then he <i>updates</i> 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 <i>notification email</i> is sent to the GBU receiving the lead, to alert them about the change.	

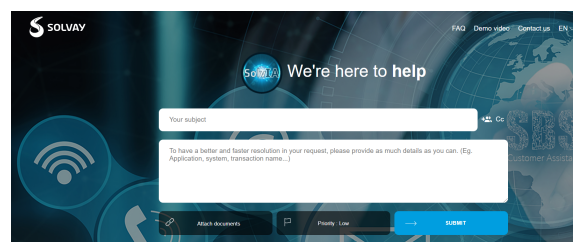
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Related articles

- [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://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