

# FD - P19. Cross BU Lead Management

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## 1. Functional Process

### Process Overview

A Cross BU Lead is a lead identified by any user but concerning another GBU or BU inside another GBU.

### Definition & use cases

#### Definition

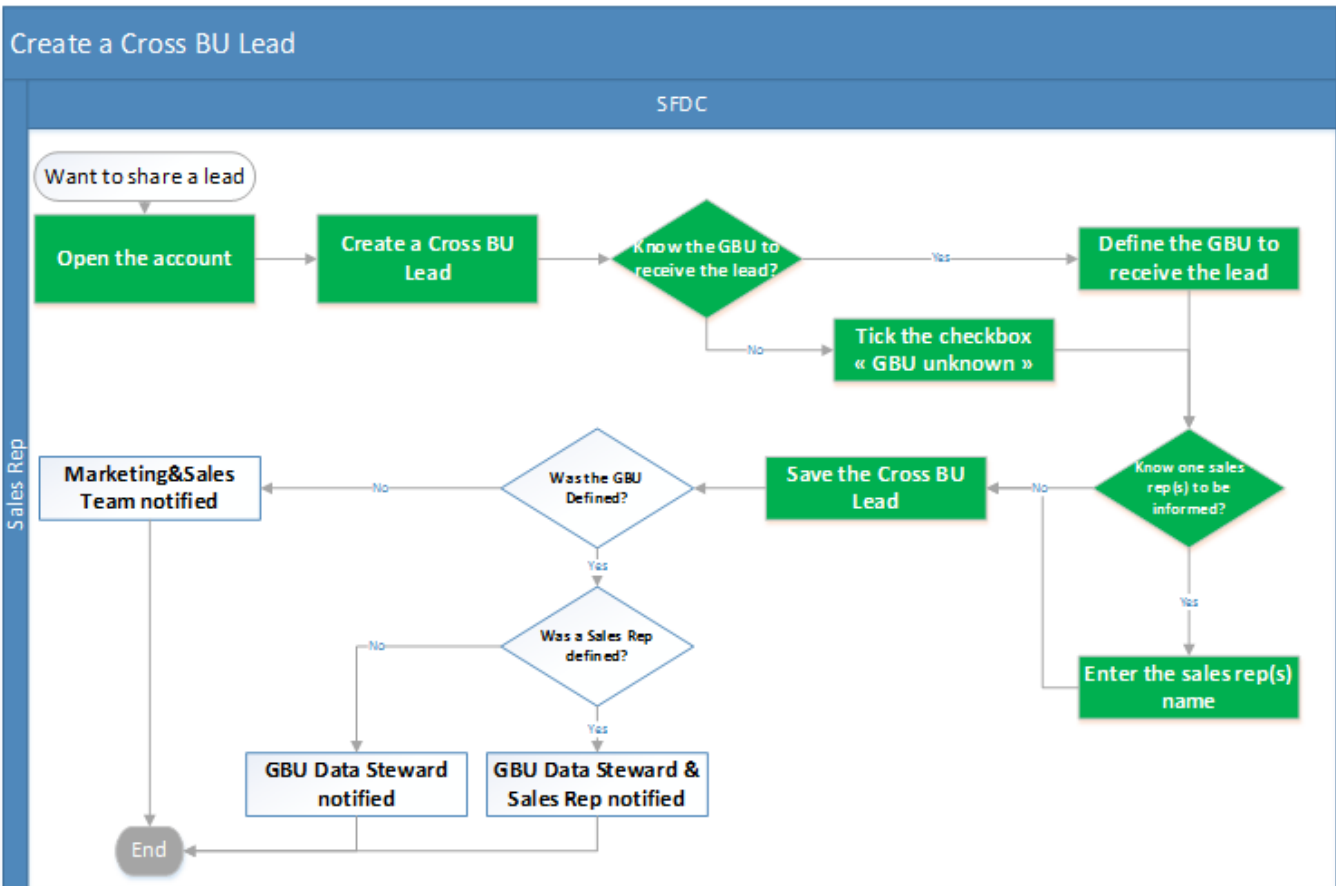
A Cross BU Lead contains the following :

- Name
- GBU Initiating the Lead
- Status: current status of the lead (Open, In Progress, Closed)
- GBU / BU receiving the Lead (or unknown)
- Description
- Cross BU Lead Segmentation
- People to be alerted of this lead creation
- Rating: evaluate the rating of the lead on a scale from 1 to 5, displayed at the top of the lead with a number of stars.
- Related list that allows to attach document to the Cross BU Lead

#### Use cases

- When visit 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 want to notify the right GBU / BU

#### Creation process



## 2. Security

### Cross BU Lead security model

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

## 3. Specific rules & automation

### Cross BU Lead Creation

The following fields are mandatory at Cross BU Lead creation:

- Lead Name
- GBU Initiating the lead
- GBU Receiving the Lead or GBU Receiving the Lead unknown\*
- Description

\* The checkbox field "GBU Receiving the Lead unknown" will have to be checked if the user does not know for sure which GBU has to receive the lead. Ticking this checkbox triggers an email sent to a dedicated team (see Cross BU Lead Email trigger), which will then define the GBU that should receive the Lead.

### Cross BU Lead Email trigger

Sales rep has the possibility to identify some specific users to receive a notification when a Cross BU Lead is created. These users will be notified by email in addition to a default group of active users defined by default for the GBU (each GBU has a Public Group dedicated to those email notifications named: "G BU-NOT-Receivers for Cross BU Lead").

### Cross BU Lead email notification

If the checkbox "GBU Receiving the Lead unknown" has been checked by the user, an email notification is sent to Corporate Marketing & Sales (M&S) queue which has the responsibility to update then the field "GBU Receiving the Lead" with the appropriate GBU / BU.

### Cross BU Lead Update

Updates are tracked when a Cross BU Lead Description is changed or when the "GBU Receiving the Lead" is defined (in case the checkbox "GBU Receiving unknown was checked and later the M&S team defined the adequate GBU).

An email is sent to the GBU receiving the lead with the change that has been recorded and to all the users potentially defined in the section "People to be notified".

### Cross BU Lead Update Limitation

The Cross BU Lead update will be limited to only the creator, to the users from the GBU defined in "GBU Receiving the lead" and to the users individually identified in the 6 fields in the section "People to be informed".

This restriction still allow the users from the GBU receiving the lead to rate it and also to the creator to potentially modify the description.

**Last modifications :**

User	Last Update
<a href="#">Emilien GUICHARD</a>	3299 days ago
<a href="#">Julien Andreoli-ext</a>	3098 days ago
<a href="#">BRAHIM, Walid</a>	
<a href="#">KANJA-ext, Zakaria</a>	
<a href="#">NWANGWU, Daniel</a>	