

# 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 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.



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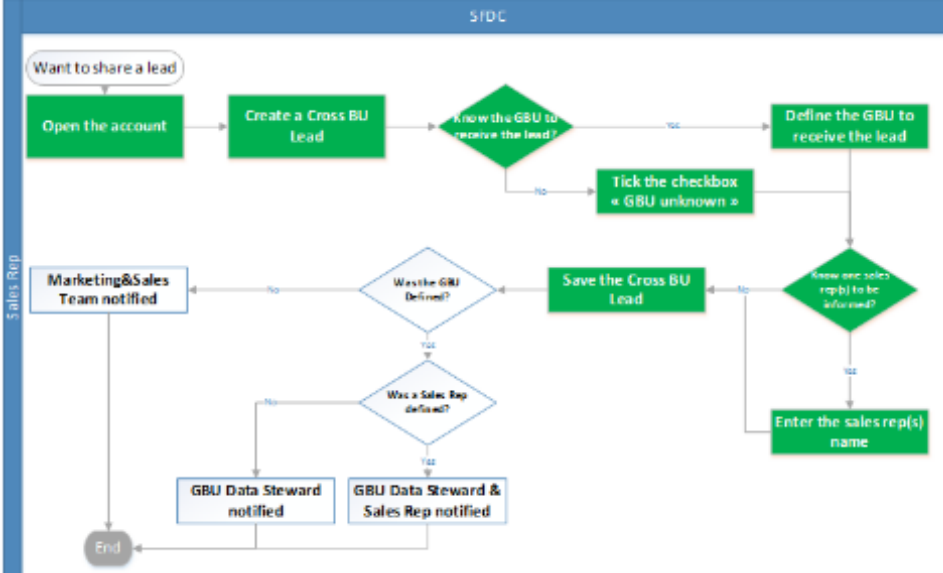
## Cross-BU Lead Rules

|                 |                                                          |
|-----------------|----------------------------------------------------------|
| 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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Google Docs, Notes, & Attachments

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: Slica

Visit Report: Visit to ILCT - project opportunities

Status: Closed

Rating: ☆☆☆☆☆

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 Chiese. If you need more information, please contact me.

Cross BU Lead Segmentation

Market: -

Segment: -

Application: -

End Use:

People to be alerted

|        |                 |        |
|--------|-----------------|--------|
| User 1 | Gabriel Madiedo | 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

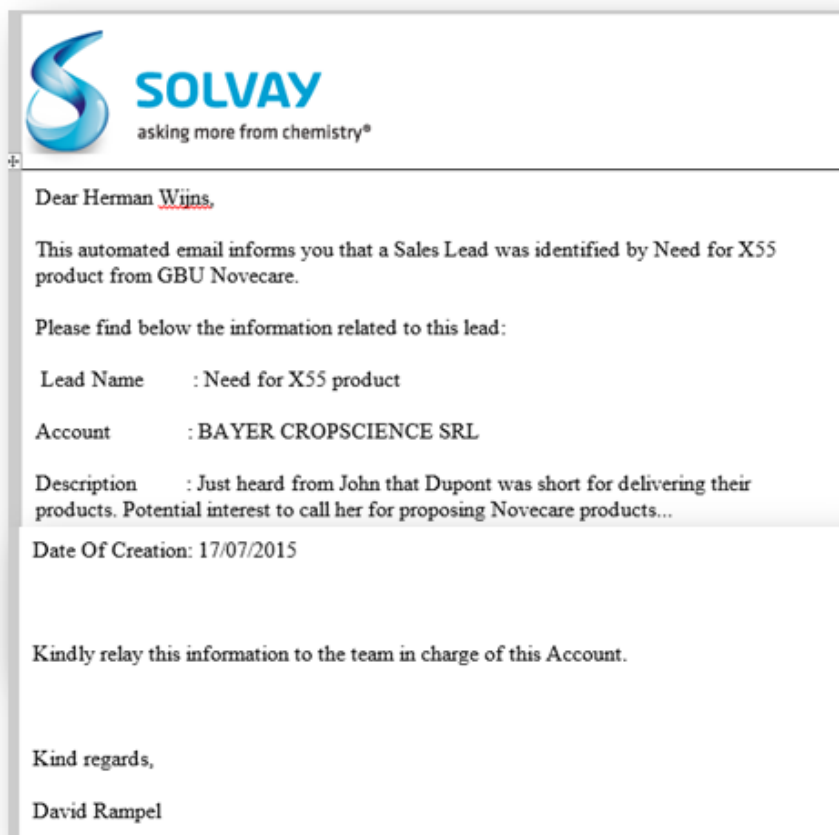
The country of the account is now displayed in the automatic notification email generated after cross GBU lead creation.

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



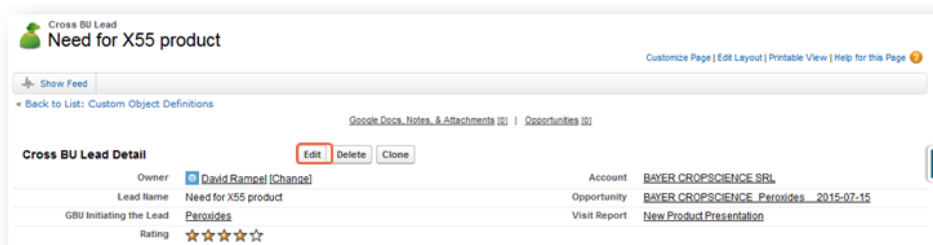
The GBU will take care of assigning the lead. It's so easy to share good tips!

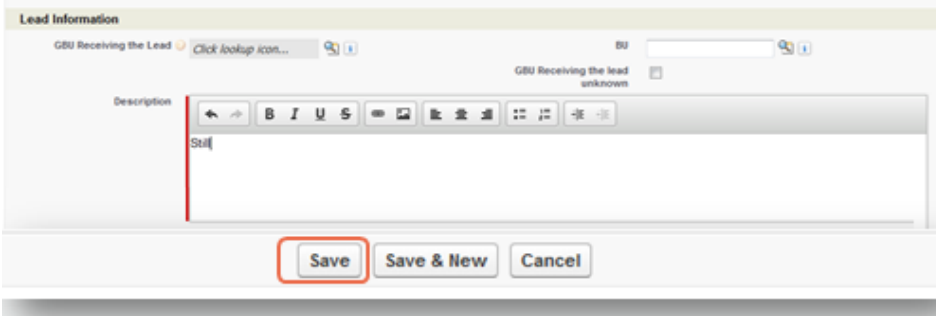
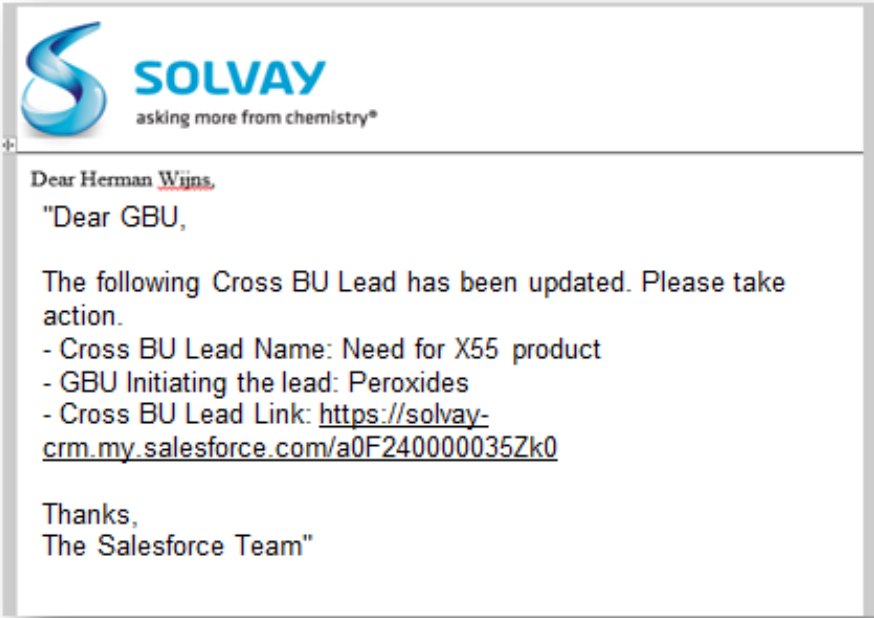


## Modify a Cross BU Lead

1

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



|                                                                                                                                            |                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>2 Then he <i>updates</i> the <b>description</b> and clicks on <b>Save</b>.</p>                                                          |  <p>Attention! Only David (creator) and the users from the GBU receiving the lead can update it.</p> |
| <p>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.</p> |                                                                                                     |

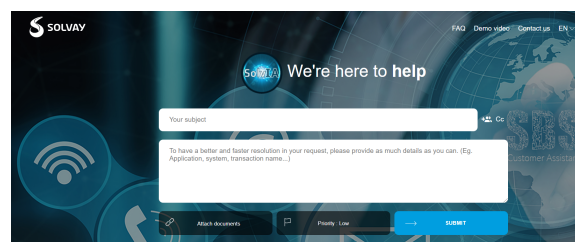
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## Related articles

- [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