Lead and Opportunity Management (Capability)

1. Role Definition

This service domain captures, evaluates and progresses identified lead/opportunities that may arise during customer relationship development, sales, servicing and fulfillment interactions. It will clarify and confirm the customer's interest and check that the product is suitable and the customer eligible prior to initiating the formal offer process (see service domain Customer Offer)

2. Example of Use

A lead is identified during a customer servicing interaction and the lead captured for subsequent follow-up

3. Executive Summary

This service domain captures, classifies and track sales lead/opportunities with established clients for additional products or services. It handles the processing of the opportunity through to the point of formal offer processing.

4. Key Features

Lead/opportunity classification and capture

Lead/opportunity evaluation and confirmation

Verify opportunity, initiate/schedule customer offer processing

Documentation

Properties

Property	Value
Service Domain	
API BIAN Portal	Lead and Opportunity Management API (https://app.swaggerhub.com/apis/BIAN-3/LeadandOpportunityManagement/12.0.0)
BIAN Proposed ISO20022 Control Record Match	SalesLeadManagement
Core Business Object	
Individual Analytics	lead/OpportunityProcedureAccumulators lead/OpportunityProcedureActivityAnalysis lead/OpportunityProcedurePerformanceAnalysis lead/OpportunityProcedureTrends&Events
Portfolio Analytics	lead/OpportunityProcedurePortfolioActivityAnalysis lead/OpportunityProcedurePortfolioMake-UpAnalysis lead/OpportunityProcedurePortfolioPerformanceAnalysis

Scenarios	
	Perform Customer Eligibility Profile Update (views/view_55074.html)
	Process Internal Upsell Campaign (views/view_55064.html)
	1b - Retrieved ASPSP Account Information Trigger NBP (views/view_54959.html)
	Execute Interactive Retention Campaign (views/view_55098.html)
	Handle Request for Product Support (views/view_55511.html)
	Develop Opportunity (views/view_55143.html)
	Process Internal Customer Upgrade (views/view_55263.html)
	Execute Internal Campaign (views/view_55350.html)
	Conduct Relationship Development Planning (views/view_55535.html)
	2 - Customer Sees the NBP Offer and Decides if to Apply (views/view_55585.html)
	Perform Customer Relationship Development Planning (views/view_55161.html)
	Handle Request for Consumer Loan Checks and Options (views/view_54741.html)

Service Role	Capture, classify and track a sales lead with an established client for additional priducts or services.

BIAN Life Cycle

Registration Status	Registered

Stereotypes

stereotype	
	ServiceDomain

Appears on ⌃

(views/view_50878.html)

(views/view_51132.html)

BIAN Coreless 2.0 Wireframe
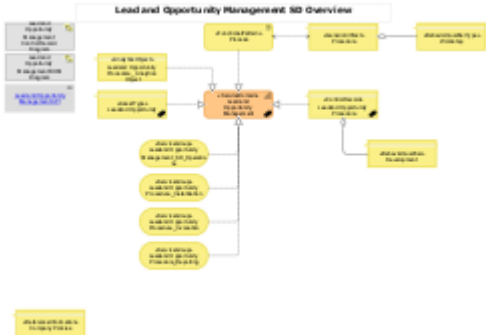
Lead and Opportunity Management SD …

(views/view_51270.html)

(views/view_51594.html)

Relationship Development

(views/view_51705.html)
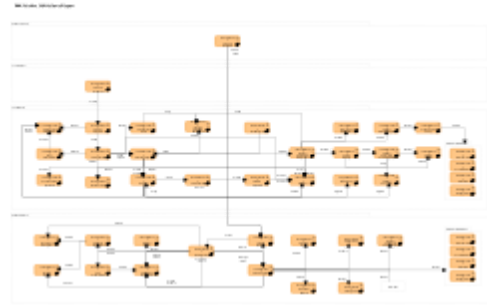
BIAN Coreless 3.0 Wireframe

(views/view_51723.html)
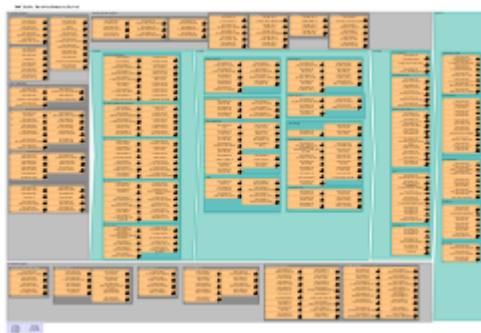
BIAN Service Landscape V12.0 Value Ch…

(views/view_51891.html)

TPP Backend

BIAN Service Landscape V12.0 Matrix Vi…

Relations

aggregated by		Sales (object_25.html?object=130075)
		Wave 1 (object_25.html?object=153747)
		Sales (object_25.html?object=172051)
		TPP Backend (object_25.html?object=83605)

gets input from	Customer Relationship Management (object_21.html?object=30437)
	Business Unit Management (object_21.html?object=30964)
	Business Development (object_20.html?object=32900)
	Customer Offer (object_22.html?object=39968)
	Customer Campaign Execution (object_22.html?object=40236)
	Customer Campaign Management (object_22.html?object=46174)
	Session Dialogue (object_23.html?object=48273)
is equal to	Lead and Opportunity Management (object_37.html?object=45447)
is part of	Sales (object_25.html?object=130075)
realized by	Leadand Opportunity Management_SD_Service Group (object_20.html?object=246176)
	In BQ Initiate, assign development of a lead/opportunity (object_12.html?object=28778)
	Leadand Opportunity (object_23.html?object=29789)
	In CR Initiate lead/opportunity procedure (capture the lead details) (object_13.html?object=31789)
	Re BQ Retrieve details about lead/opportunity development (object_11.html?object=32850)
	Re CR Retrieve details about a lead/opportunity (object_13.html?object=33847)
	Ec CR Accept, reject etc a lead/opportunity procedure (object_13.html?object=34632)
	Leadand Opportunity Procedure (object_24.html?object=36469)
	Rq BQ Request manual intervention in development (e.g. prospect contact) (object_15.html?object=41368)
	Ex BQ Execute automated action against a lead opportunity development task (e.g. generate message) (object_15.html?object=42858)
	Up CR Update details about a lead/opportunity (object_16.html?object=45731)
	Up BQ Update details about lean/opportunity development task (object_16.html?object=46465)
	Co CR Control the processing of a lead/opportunity (e.g. raise priority) (object_17.html?object=48396)
	Process (object_28.html?object=58066)
	Leadand Opportunity Procedure_Instantiation (object_17.html?object=60871)
	Leadand Opportunity Management_SD_Operations (object_20.html?object=60874)
	Leadand Opportunity Procedure_ Analytics Object (object_25.html?object=60878)
	Leadand Opportunity Procedure_Reporting (object_17.html?object=60903)
	Leadand Opportunity Procedure_Invocation (object_17.html?object=60913)
	Change the name "Lead/Opportunity Management" to "Lead and Opportunity Management" (object_30.html?object=64813)

sends output to	Party Routing Profile (object_21.html?object=31558)
	Customer Agreement (object_20.html?object=32862)
	Customer Product And Service Eligibility (object_21.html?object=36792)
	Legal Entity Directory (object_21.html?object=37530)
	Customer Offer (object_22.html?object=39968)
	Customer Campaign Execution (object_22.html?object=40236)
	Customer Campaign Management (object_22.html?object=46174)
serves	Lead Management (object_6.html?object=130393)
triggered by	Customer Relationship Management (object_21.html?object=30437)
	Party Routing Profile (object_21.html?object=31558)
	Customer Offer (object_22.html?object=39968)
	Customer Campaign Execution (object_22.html?object=40236)
	Point of Service (object_22.html?object=43170)
	Consumer Advisory Services (object_22.html?object=44522)
	Session Dialogue (object_23.html?object=48273)
triggers	Party Routing Profile (object_21.html?object=31558)
	Customer Offer (object_22.html?object=39968)