Create Opportunity

Follow the standard process to create an opportunity by adding 'BlueSheet' in the opportunity name.

Example of Naming Convention:
BlueSheet_ProductDesc_Qty_AccountName_AcctContact

Opportunity Creation Guidelines can be found here.

Fill in the BlueSheet form

Click here to download the BlueSheet form.

Required fields:
1. Customer timing for priorities *(drop-down menu)*
2. Euphoria-Panic *(drop-down menu)*
3. Customer's Stated Objective
4. Evaluation of Objective
5. Competition
6. Opportunity Score Card *(drop-down menu per criterion)*
7. Place in Sales Funnel *(drop-down menu)*
8. My Position vs. Competition *(drop-down menu)*
9. Buying Influences Involved *(Name, Title, Location)*
   - Role *(drop-down menu)*
   - Degree of Influence *(drop-down menu)*
   - Mode *(drop-down menu)*
10. Win – Results
    - Personal Wins
    - Business Results
11. Competitive Preference
    - Rating +5/-5 *(drop-down menu)*
    - Evidence to Support Rating
12. Summary of my position today
    - Strengths
    - Red Flags
13. Possible Actions

Note: Grey-highlighted fields will be extracted from Salesforce

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Attach the BlueSheet form to the Opportunity (1/2)

1. In an opportunity page, go to the 'Related List Quick Links' and search for the 'Files':
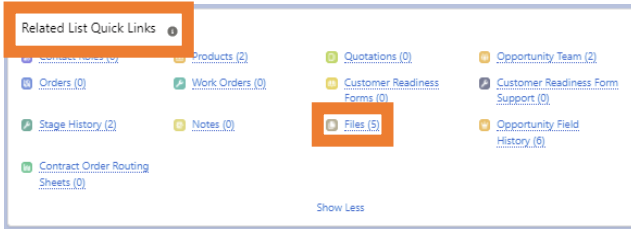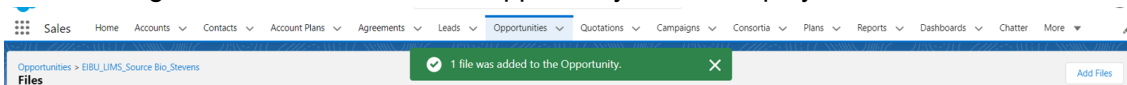

2. Hover over the 'Files' quick link, and click 'Add Files':
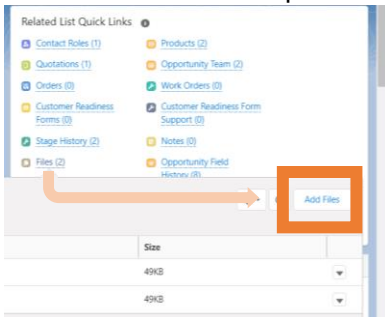
3. Click 'Upload file', select a file from your personal folders and click 'Done' to complete the upload:


The message '1 file was added to the Opportunity' will be displayed:

Attach the BlueSheet form to the Opportunity (2/2)

Best Practice
- Use the following **naming convention** for the uploaded file:
  Opportunity Name_Version Number
  E.g.: BlueSheet_NovaSeq_1_Auragen_Sanlaville_version 1
- **Review** the BlueSheet form whenever updates are required and upload a new version
- **Do not** delete older versions
- **Do not** use the 'Upload New Version' button (because the previous version will be removed)
- Always use the **'Upload files'** button and not the listed recent files (to avoid attaching files with th
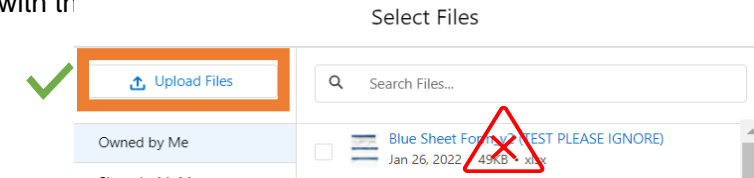
- You can use the option **'Edit File Details'** to edit the naming if required
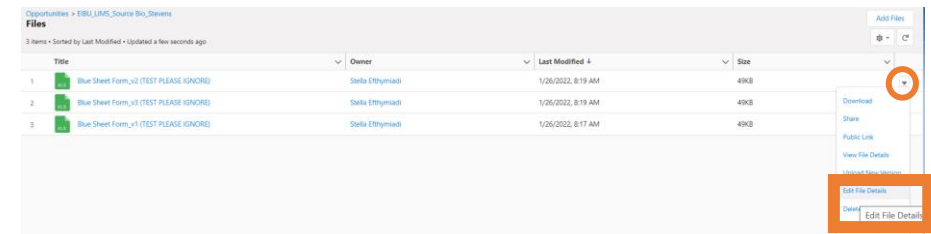
Need Help?

Contact salesops_EMEA@illumina.com

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BlueSheet Training Material in Sales Hub

How can I find training material?

- Visit the Commercial Documentations page of the EMEA Sales Hub

- Use the search functionality to find relevant documents
    - You can use search terms such as 'opportunity', 'bluesheet', 'Miller Heiman'

- The current training material as well as the BlueSheet form are available in the 'BlueSheet Opportunity Management' card
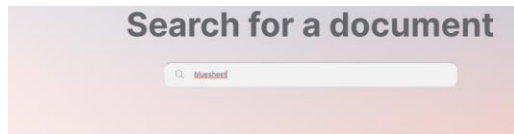
- You can also access the 'Opportunity Creation Guideline' document for a step by step guide on the standard process of creating an opportunity

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