ITC Pipeline Tool Standard Operating Procedure (SOP)

1. Purpose - The purpose of this Standard Operating Procedure (SOP) is to detail the Pipeline Management process of merging Sub Category pipelines into one, and inputting, tracking and monitoring ITC opportunities through the capture process using the ITC Pipeline Tool. The ITC Pipeline Tool was developed as a means to enhance the visibility of the ITC opportunity funnel and is integral to ITC managing and tracking all of its opportunities so that the organization can win opportunities more effectively.

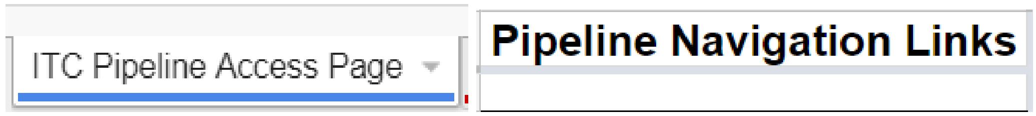
2. Background - Maintaining and tracking opportunities within ITC in the past have been done independently and with minimal coordination across the organization. Disparate databases or other tracking mechanisms were established by the individual business lines and then reported out as needed. The Salesforce tool has been available, but to this date it is not user friendly, needs refinements, and has not been widely adopted in order to be a functional tool across ITC. The CED Team is working with the CIOs office to enhance this tool and the goal is to have Salesforce as the ITC standard to capture and track all business opportunities across the organization. Until Salesforce is up up and fully functional, CED has developed a “ITC Pipeline Tool” that is utilizing the Google Sheets platform. The ITC Pipeline was derived from the process/spreadsheet that was originally developed by the Alliant GWAC office and has been modified over the past 18 months to accommodate the changing roles and functions within ITC. More specifically, modifications include the addition of BD Teams, Sub Categories, team members, and a few other fields that will be useful for collaboration and transparency across ITC. With the ITC Pipeline Tool, CED is starting the process to have ITC share and work closely together as one organization and keep track of opportunities as to not to duplicate efforts and work more efficiently.

3. ITC Pipeline Tool Overview - The ITC Pipeline Tool is comprised of the following tabs:
   - ITC Access Page - provides overview of ITC pipeline funnel & quick access links
   - ITC Pipeline - primary opportunity tab **(NO EDITS/CHANGES/FILTERING ALLOWED)**
   - Member Totals - shows breakdown of opportunities by member and probability
   - Top Opps - opportunities in the pipeline that are of high potential and value
   - Dashboard - provides real time KPI and metrics regarding the pipeline health as it relates to reaching targeted goals and objectives.
   - Resources - provides insight into the ITC Pipeline methodology and function

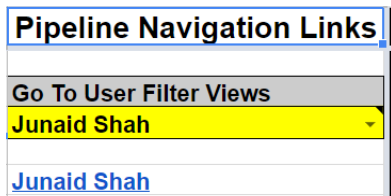
4. ITC Pipeline Tool Process Description
   A. Request Access:
      a. Due to functional limitations regarding the number of people who can be in a Google document at the same time, CED asks that only those individuals who will be inputting, managing or monitoring opportunities request access.
         i. Requesters will be granted either “Can edit” or “Can view” access depending on the level of user interface needed.
      b. Once access is granted, a “User Filter View” will be created for the user to use when utilizing the tool/document.

   B. Training:
      a. New users should attend a training session with the CED Pipeline Team to ensure they are familiar with the functionality of the ITC Pipeline Tool before modifying information.

   C. Using the ITC Pipeline Tool:
      a. Users should always enter the ITC Pipeline via the “ITC Access Page” and use the “Pipeline Navigation Links” to access what they need.



b. To access the “User Filter”, click on the name drop down list under “Go To User Filter Views” and select the appropriate name. Once the name is selected from the list, click on the highlighted name to access the link.

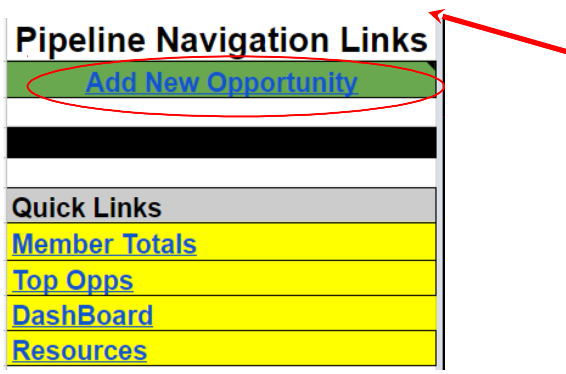


User Filters

NOTE: User should contact Darron Holland or Philip Oyoo with any questions or concerns regarding this task.

D. Inputting Opportunities:

a. Users should **<u>ALWAYS</u>** use the “Add New Opportunity” link located on the ITC Access Page under Pipeline Navigation Links to enter new opportunities. This link will take users to the “Pipeline Opportunity Form”.



Pipeline Opportunity Form

NOTE: User should enter as much of the requested information as possible, and keep in mind that all mandatory fields must be completed for the New Opportunity to be added.

b. Should users need to input multiple opportunities, 25 or more, please coordinate with Philip Oyoo and/or Darron Holland to coordinate a data transfer.

E. Managing & Monitoring Opportunities:

a. Users should manage and monitor opportunities using the fields created to provide updates as it relates to opportunity value, estimate date of award, next action, change in status, probability, ownership, contract vehicle, period of performance, contact info and any other pertinent data regarding the opportunity.

i. If the “Date of Next Action” is highlighted in red, it means the action is passed due and requires immediate attention.

5. <u>General Rules of Engagement</u> - All new opportunities should be entered into the ITC Pipeline Tool via the “Pipeline Opportunity Form” by the Sub Category owner or CED Account Manager. Opportunities may also be loaded via a data transfer, but prior permission and coordination is needed from CED (not using the Pipeline Opportunity Form will cause data integrity issues).

A. Duplication - before entering any opportunity in the ITC Pipeline Tool, the person entering the opportunity should check to see if the opportunity already exists in the spreadsheet. Possible ways to search:

a. Please note that the “CTRL F Search” and Filter & Sort features to find duplicates works best if you use it **WITHIN YOUR USER FILTER:** **(PLEASE COORDINATE WITH THE OPPORTUNITY OWNER PRIOR TO DELETING OR MAKING CHANGES)**
   1. Make sure there are no filters turned on in your User Filter to ensure all opportunities are revealed.
   2. Make sure “Select All” is selected in the ITC Lead column
   3. Filter by the desired “End User Agency” of the opportunity you’re looking for to ensure they match.
   4. Filter by “Fiscal Year” to ensure they match.
   5. If you know the amount of the opportunity, filter by the “Lifetime Amount” to try and find a match.
   6. Once you’ve narrowed the field down, you can then look to see if there are any duplicates within the “Name & Description/Scope of Opportunity”
   7. If you find a duplicate, notify the opportunity owner before deleting or making any changes to ensure you’re both on the same page.

B. Salesforce Link - should the opportunity exist in Salesforce, provide the link in the spreadsheet.

C. Identify ITC Lead and Capture Team Members - list appropriate POCs as needed.

D. Opportunity Management - opportunity Lead and/or Team Members should be responsible for updating opportunities they own.
   a. Frequency, sources (GovWin)
   b. Keep ITC stakeholders informed
   c. Update status column in spreadsheet for significant items and/or as needed.
   d. Prior to making contact with a customer, always prepare by checking to see if the customer is an existing contact within Salesforce.
   e. Opportunity ownership should not be changed without prior awareness and agreement from the existing opportunity owner.
   f. Top opportunities should be identified in the ITC Opportunity Pipeline Tool.

E. CED Support - if CED business development input and/or support is needed, check the appropriate box when completing the “Pipeline Opportunity Form”.

F. CASE Support - check within Salesforce if customer relationship exists and it is recommended to coordinate with the local CSD. If appropriate, add the CASE representative to “Capture Team Member” column.

G. Customer Outreach - customer meetings should be coordinated within ITC and appropriate CASE counterparts. Also ensure that the “Status & Comments” column is updated as needed.

H. ITC Executive Support - Sub Category should identify needs for an executive involvement in pipeline and communicate that at the ITC CED Category Managers Pipeline meeting.

I. Probability Stage Updates - coordinate/inform ITC opportunity lead when updating an opportunity in the ITC Pipeline Tool.

J. Unique Identifier - any scope review reference and/or any unique category identifier should not be altered or removed.

K. Mistakes - while working within the ITC Pipeline Tool, should an employee input data into a field in error, it is imperative to delete/modify that entry **WITHOUT** using the UNDO function, as this may impact other’s working in the document at the same time.

6. <u>ITC Pipeline Tool Improvements and Enhancements</u> - The ITC Pipeline Tool will be continually reviewed and updated as needed, with comments and suggestions welcomed from all. The goal of the tool is to provide greater visibility and transparency for building the pipeline,

establishing client relationships, capturing business, and ultimately increasing ITC business. It also improves process efficiency and ease of use.

Should individuals want training or have any questions using the ITC Pipeline Tool, please coordinate with Darron Holland or Phillip Oyoo.