

# Opportunity Assessment Request to Medical

## Learning Objectives

After completing this unit, you'll be able to:

- Create a Product Opportunity Team
- Create an Opportunity Assessment for Medical Evaluation

## Introduction



**Haru**

Global Portfolio Manager

Haru, the Global Portfolio Manager wants to take a project to selection but before doing so he must request an Opportunity Assessment from the Medical Team so they can record Medical Evaluation outcomes that will move the process forward.

The Global Portfolio Team and the Medical Team work closely together during the Medical Evaluation Process to make this happen. If you want to learn about the responsibility of the Medical Team and how they record the outcome of Medical Evaluation, then please read the 'How to Record a Medical Evaluation in SANITY' (<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0078th>), module on myTrailhead!

Global Portfolio  
Manager



Medical Manager

# Create an Opportunity Request for Medical

You should start from the same Selection Opp D&D intended for GPC Selection.

Let's follow the process:

1. Click on the **"Team"** tab from the Opp D&D
2. Click on **"New Team Member"** button on the "Product Opportunity Team" object

The screenshot shows the 'Opportunity Detail & Diligence' page for 'Vorinostat HGC (New Selection) -2'. The page has a top navigation bar with 'Global Portfolio' and several dropdown menus. Below the navigation bar, there's a header section with a shopping cart icon, the title 'Opportunity Detail & Diligence Vorinostat HGC (New Selection) -2', and buttons for '+ Follow', 'Manage Countries', and 'Manage Opportunity'. A table below the header shows 'Record Type' as 'New Selection', 'Evaluation Status' as 'Active', 'Feedback Average' as '0.0', 'Product & Project(s) Links' as 'Product: Vorinostat HGC', and 'Originator Product' as 'Vorinostat HGC'. Below the table, there's a progress bar with 'Declined', 'On-hold', 'Active' (highlighted), and 'Under Review' stages. A tabbed interface below the progress bar shows 'Details', 'Team' (highlighted with a red box and '1'), 'Feedback', 'Countries', 'Forecasts', 'Quip', and 'Selection Process'. Under the 'Team' tab, there's a section for 'Product Opportunity Team (0)' with a 'New Team Member' button (highlighted with a red box and '2') and a 'Contact My Team' dropdown. Below this is a section for 'External Teams (0)' with a 'New' button.

3. In the **"Contact"** field, please choose **"Elena Zakirova"** (Head Global Medical Science and Affairs) who will further assign to the correct Medical Manager on a temporary basis (valid as Dec 9, 2022)
4. In the **"Organization Unit"** field, please choose **"Medical"**
5. In the **"Role"** field, please choose **"Medical Manager"**

### New Product Opportunity Team

Information

Contact ?

Elena Zakirova ×

Organization Unit

Medical ▼

[View all dependencies](#)

Role

Medical Manager ▼

[View all dependencies](#)

Active Team Member ? ☒

Include in Feedback ? ☒

Include in Approval ? ☒

System

\* Product Opportunity Name

Vorinostat HGC -2 ×

\* Product Opportunity Contact Role Number

Vorinostat HGC -2

System Information

Contact User

Search People... 🔍

Included in PSB Approval ? ☐

In Approval ☐

Included in DRB Approval ? ☐

Cancel

Save & New

Save

6. Go back to the Opp D&D and click on the **"Feedback"** tab

7. Click on **"New"**

Global Portfolio

Home

Portfolio Projects ▼

Meetings ▼

Tasks ▼

Product Targets ▼

Opportunity Detail

Opportunity Detail & Diligence

Vorinostat HGC (New Selection) -2

+ Follow

Manage Countries

Manage Opportun

Record Type

New Selection

Evaluation Status

Active

Feedback Average

0.0

Product & Project(s) Links

Product: Vorinostat HGC

Originator Product

Vorinostat HGC

Declined

On-hold

Active

Under

Details

Team

Feedback

Countries

Forecasts

Quip

Selection Process

Opportunity Assessment (0)

New

Change Owner

8. Please select the **"Product Opportunity Team Member"**

9. Please choose a **"Feedback Status due date"** by when you want the Medical Evaluation to be ready

Global Portfolio Home Portfolio Projects Meetings Tasks Product Targets Opportunity Detail & Diligences Assessment-107944 More

New Assessment record for Opportunity:Vorinostat HGC -2

"Please select a Product Opportunity Team member. If there are no active team members or to skip this step simply click next".

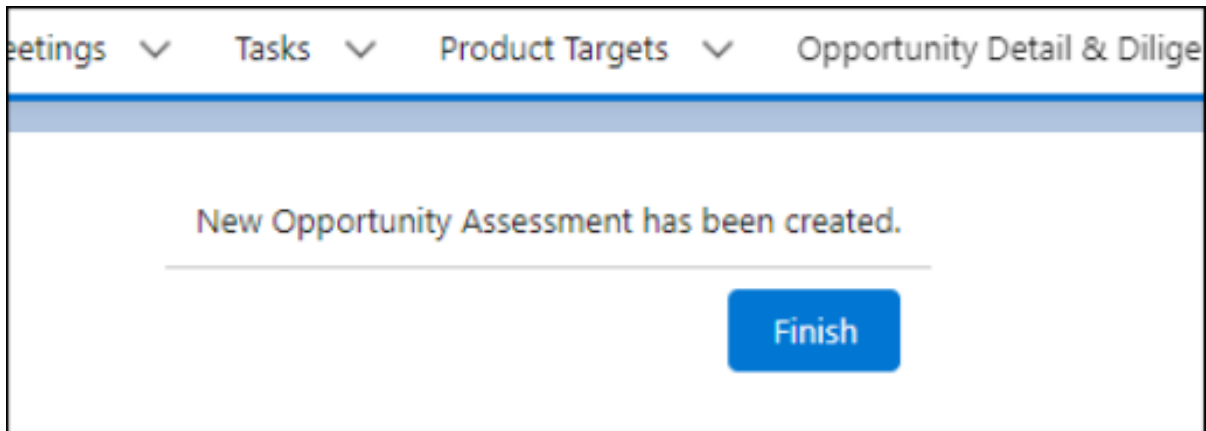
Product Opportunity Team Member

Feedback Status due date

01-Dec-2022

Next

You will receive a **"New Opportunity Assessment has been created"** message.



Congratulations!

You will need to wait until the Medical Team takes action on the Opportunity Assessment to record the Medical Evaluation.

## Follow-up with Medical Team

Let's follow up on the Medical Evaluation to see if the Medical Team has completed the request.

Let's follow the process:

1. You should check the **"Opp DD Joint Files"** section to see if the assigned Medical Manager already uploaded the assessment. You will see the same also in the Files section in the Opp D&D
2. You can use the **"Chatter"** function to communicate with the assigned Medical Manager

Global Portfolio Home Portfolio Projects Meetings Tasks Product Targets Opportunity Detail & Diligences Assessment-107944 More

Opportunity Assessment  
**Assessment-107944** + Follow Create Additional Assessment Change Owner Edit

Function Medical Status Risks Likelihood Value Opportunity Diligence Vorinostat HGC -2

**Details** Historical Assessments Record History & Activity

Opportunity Diligence	Vorinostat HGC -2	Owner	
Product Therapeutic Area	Oncology	Function	Medical
ATC	L1X (All Other Antineoplastics)	Role	Medical Manager
Feedback Type	Portfolio Selection	Product Opportunity Team	

Summary

Overall Assessment

Assessment Status	Draft	Feedback Status	19/12/2022
Feedback Value	Not Assessed	Status	

Risks

Detailed Feedback

Feedback

Risk Overview

**Opp DD Joint Files** More

Files dropped here will be visible on all Assessments and on the main Opportunity Detail & Diligence record

Files for Parent Opportunity Detail & Di... (0)

Upload Files

Or drop files

**Chatter** Activity

Post Poll

Share an update... Share

Search this feed...

Once the Medical Manager uploads the Medical Assessment and sets '**Assessment Status**' to '**Final**', the GPfM owning the Opp D&D will get an email notification with a link to the related Opportunity.

**Sandbox: Feedback is finalized**

noreply@salesforce.com on behalf of

To

Retention Policy My Personal Archive (3 years) Expires 20/09/2025

Dear SANITY User,

The feedback assessment requested by you has been finalized. You can now view it by clicking on this [link](#) related to Opportunity :

Thank you

Your SANITY Team

Excellent!

You can now proceed with taking your project to selection at GPC.