

CREATING NEW OPPORTUNITIES

1. **Staff** confirms the need for a new opportunity with **your Practice Leader** - that an opportunity needs to be created for the pursuit that you are considering
2. **Capture Manager(CM) or Designee** Notifies **Marketing Coordinator (MC)** - requesting a New Opportunity number
3. **Marketing Coordinator** creates the **Opportunity & Prop records within 24 hours of request** - and provides the CM or designee the corresponding OPPO and PROP numbers
4. **CM or Designee** QC's the new opportunity record and resolves any discrepancies - you are responsible for the accuracy of the opportunity information in Vision

Time Sensitive Opportunities

- Notify the Marketing Coordinator (MC) if an opportunity that needs to be created immediately.
- If MC is not available, the MC, CM, or designee will coordinate with others trained to properly create opportunity/prop records.
- Others currently trained to create opportunities
 - ✓ **Mike Wagner**
 - ✓ **Misty Ramirez**