Opportunity Management in Salesforce

Independent Project: Use Salesforce to Close Sales Deals

Ngwu Ogbonna Prince

Part A Overview

1. **Task 1:** Update FoodStars.org Opportunity Record
2. **Task 2:** Update Yaloo Search Opportunity Record
3. **Task 3:** Use Opportunity Kanban
4. **Task 4:** Perform a Business Case Analysis

Software used: Trailhead playground and salesforce developer account

Part A, Task 1:

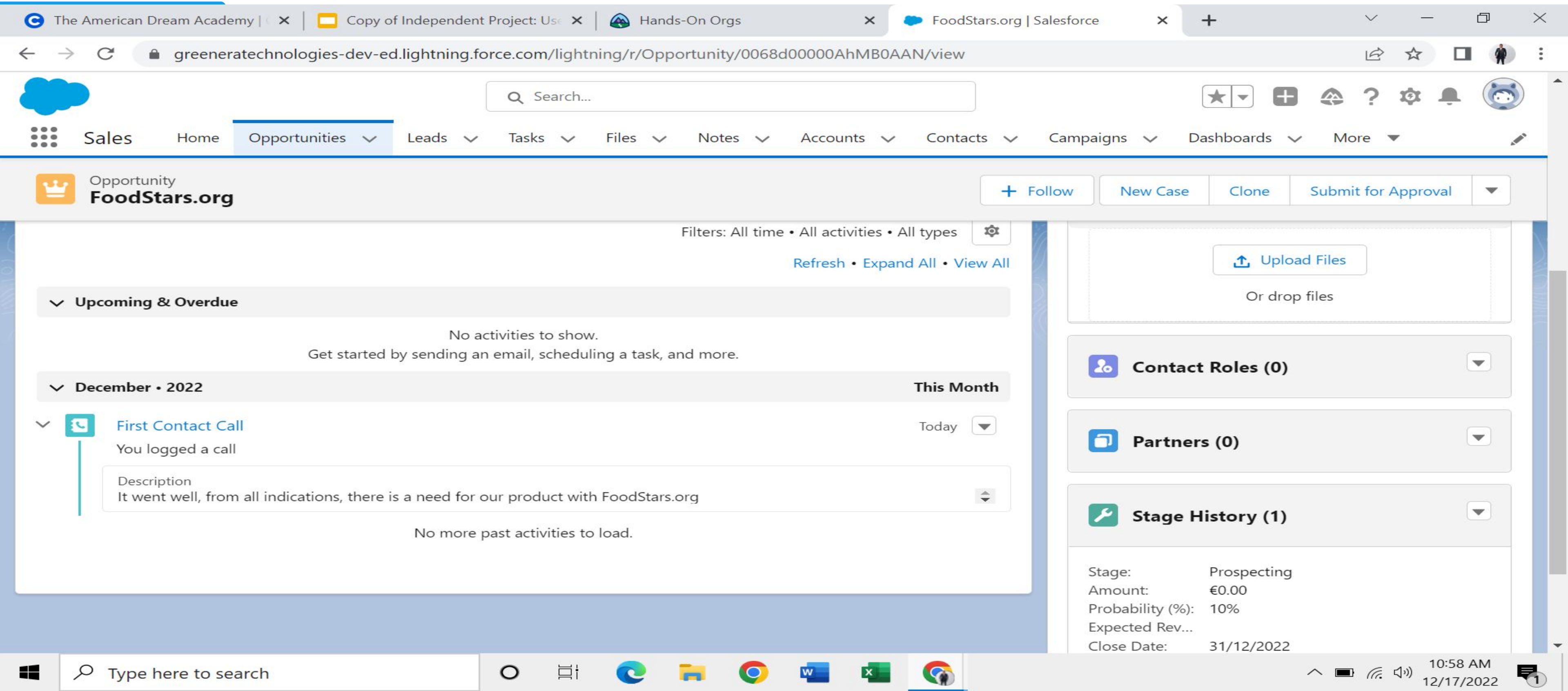
Update FoodStars.Org Opportunity Record

Added screenshots for each of these steps on the following slides to show the updates to the FoodStars.org opportunity record.

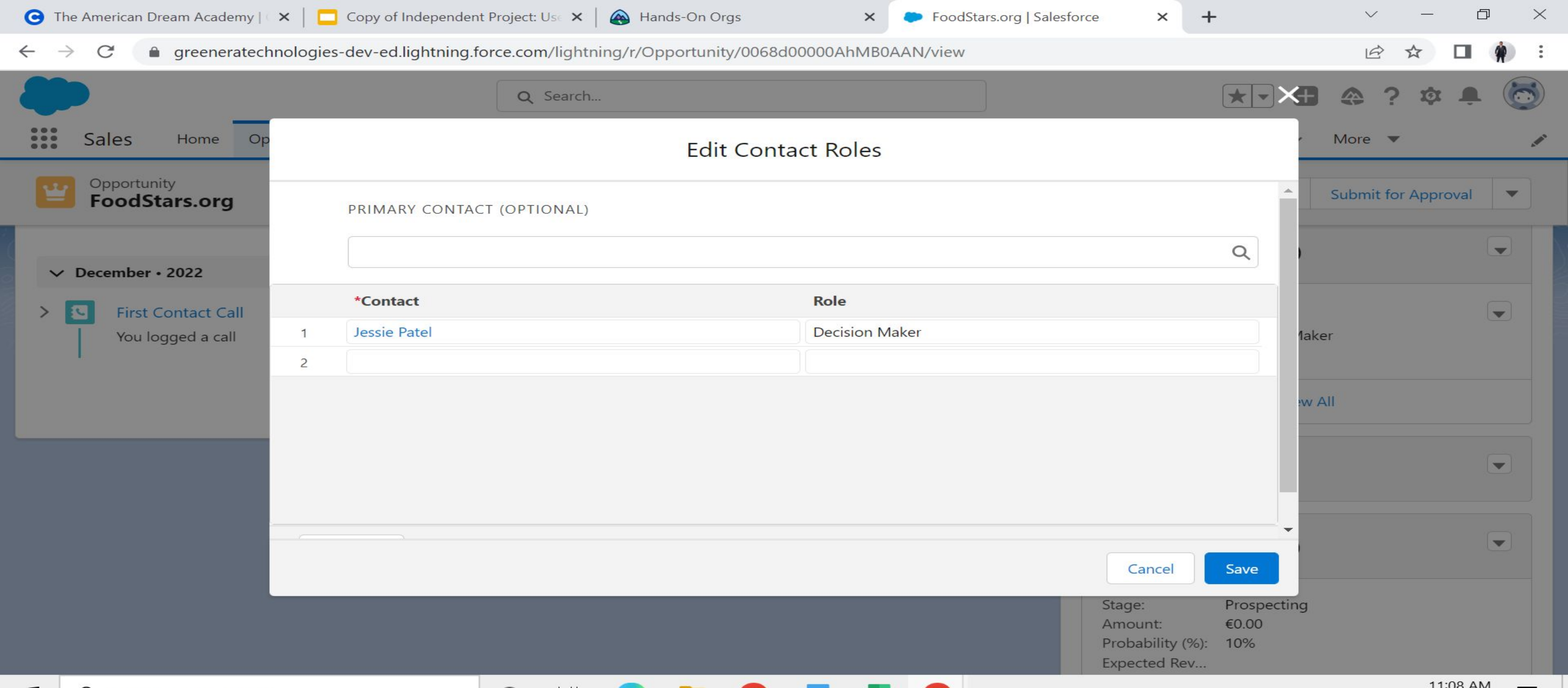
- *I ensured that the title of the opportunity in my screenshot is clearly visible.*

Step 1: Past activities showing the call logged with Martha
Step 2: Contact roles section showing Jessie Patel has been added
Step 3: Notes section showing I added a note about licenses
Step 4: Past activities showing the event created to meet with Jessie
Step 5: Past activities showing the task created to confirm budget
Step 6: Sales path showing the opportunity is now in the "Value Proposition" stage

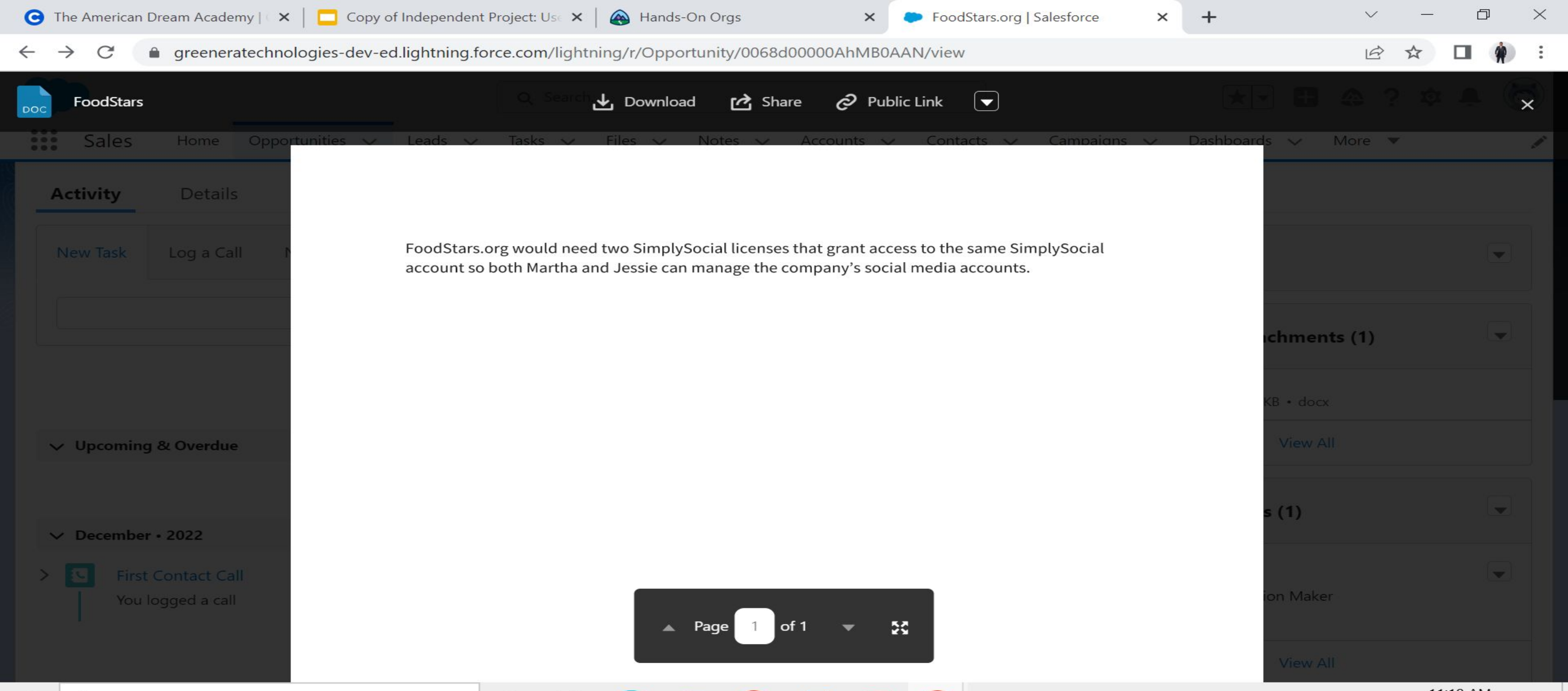
Part A, Task 1: Update FoodStars.Org Opportunity Record



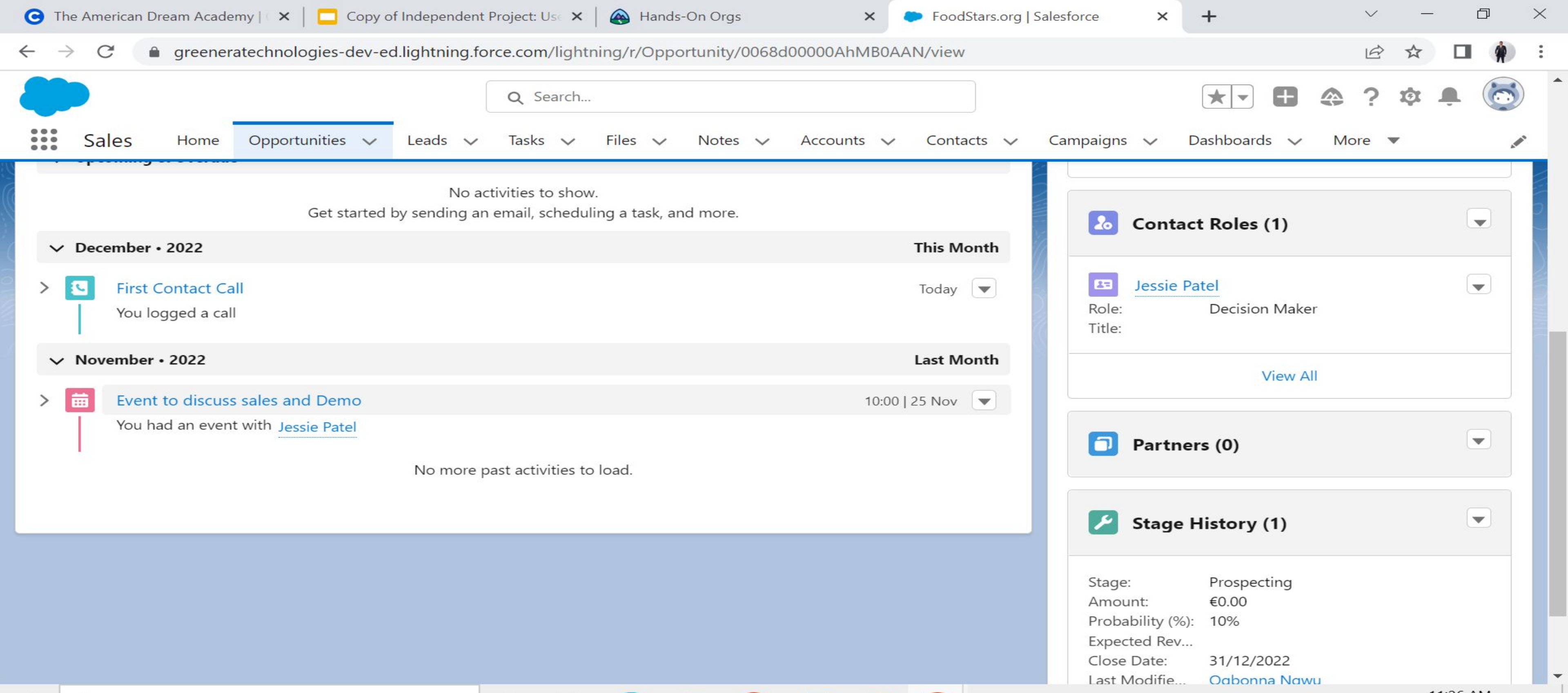
Part A, Task 1: Update FoodStars.Org Opportunity Record



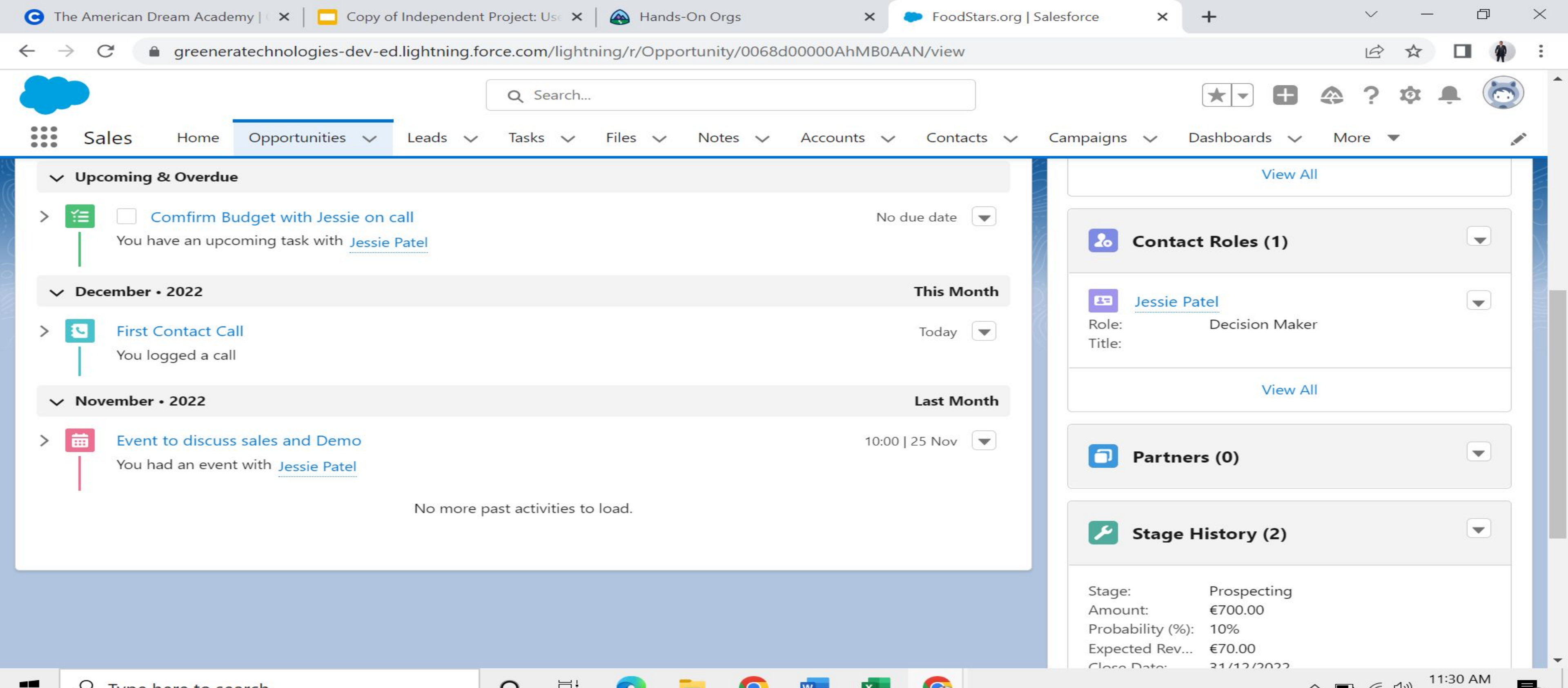
Part A, Task 1: Update FoodStars.Org Opportunity Record



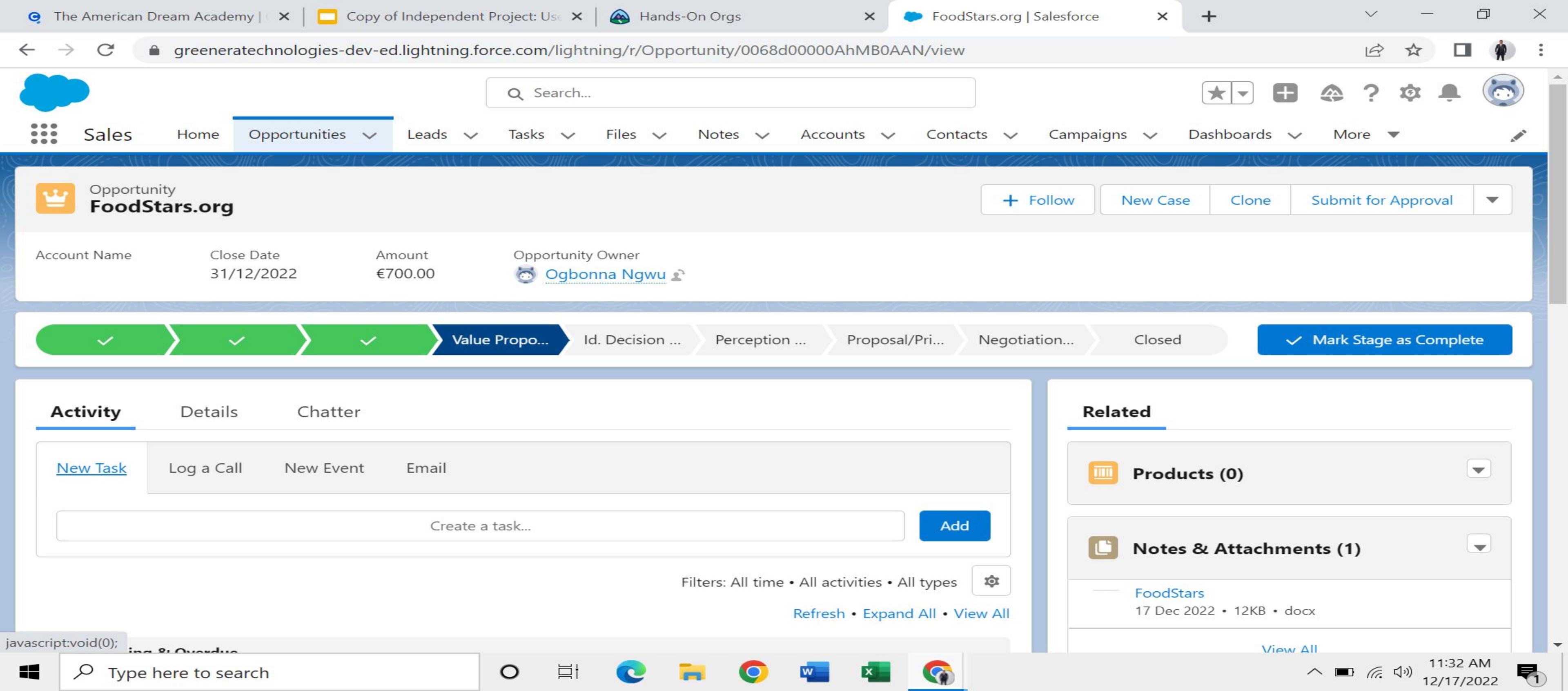
Part A, Task 1: Update FoodStars.Org Opportunity Record



Part A Task 1: Update FoodStars.Org Opportunity Record



Part A, Task 1: Update FoodStars.Org Opportunity Record



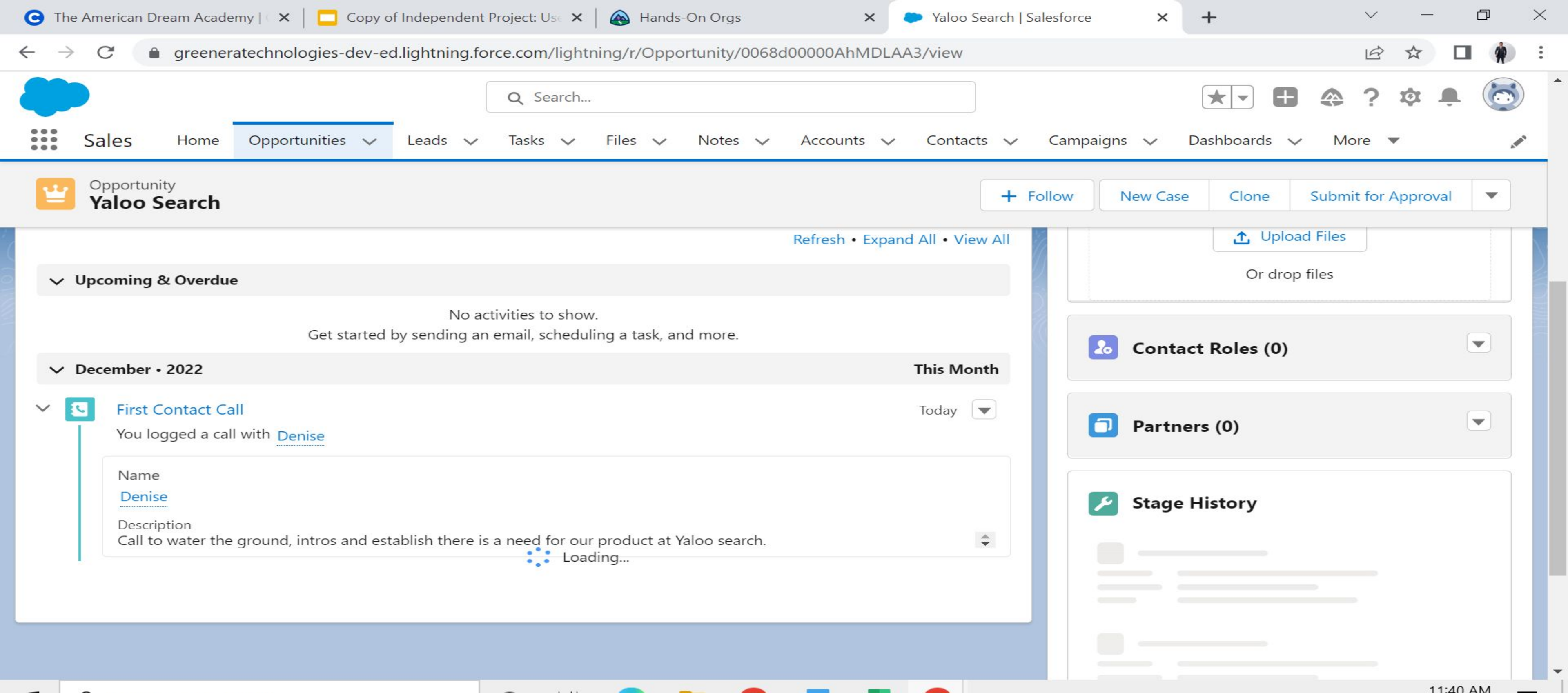
Part A, Task 2: Update Yaloo Search Opportunity Record

Insert screenshots for each of these steps on the following slides to show the updates to the Yaloo Search opportunity record.

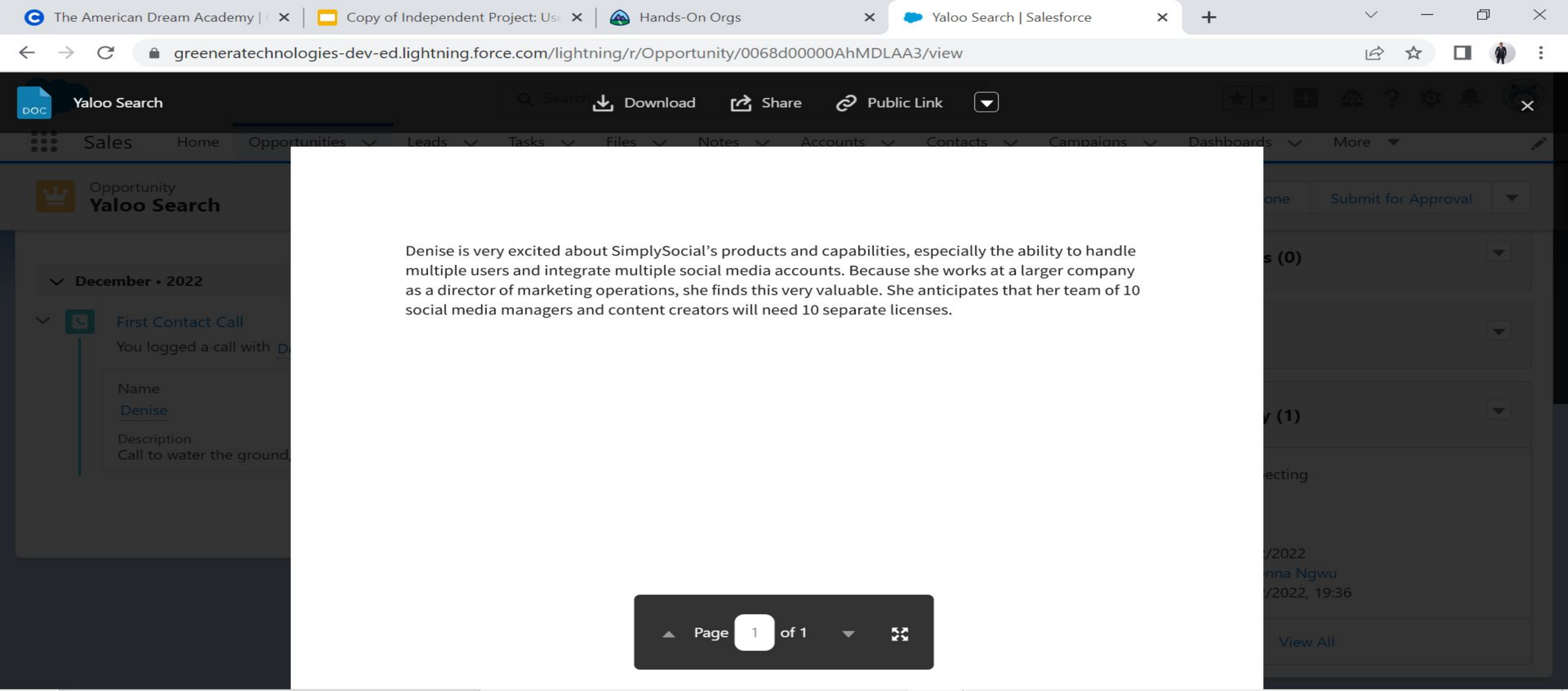
- *I ensured that the title of the opportunity in my screenshot is clearly visible.*

Step 1: Past activities showing the call logged with Denise
Step 2: Notes section showing I added a note about licenses
Step 3: Details tab showing I updated the opportunity amount
Step 4: Contact roles section showing Kenny and Wonhee have been added
Step 5: Past activities showing the event created for the demo
Step 6: Sales path showing the opportunity is now in the “Needs Analysis” Stage

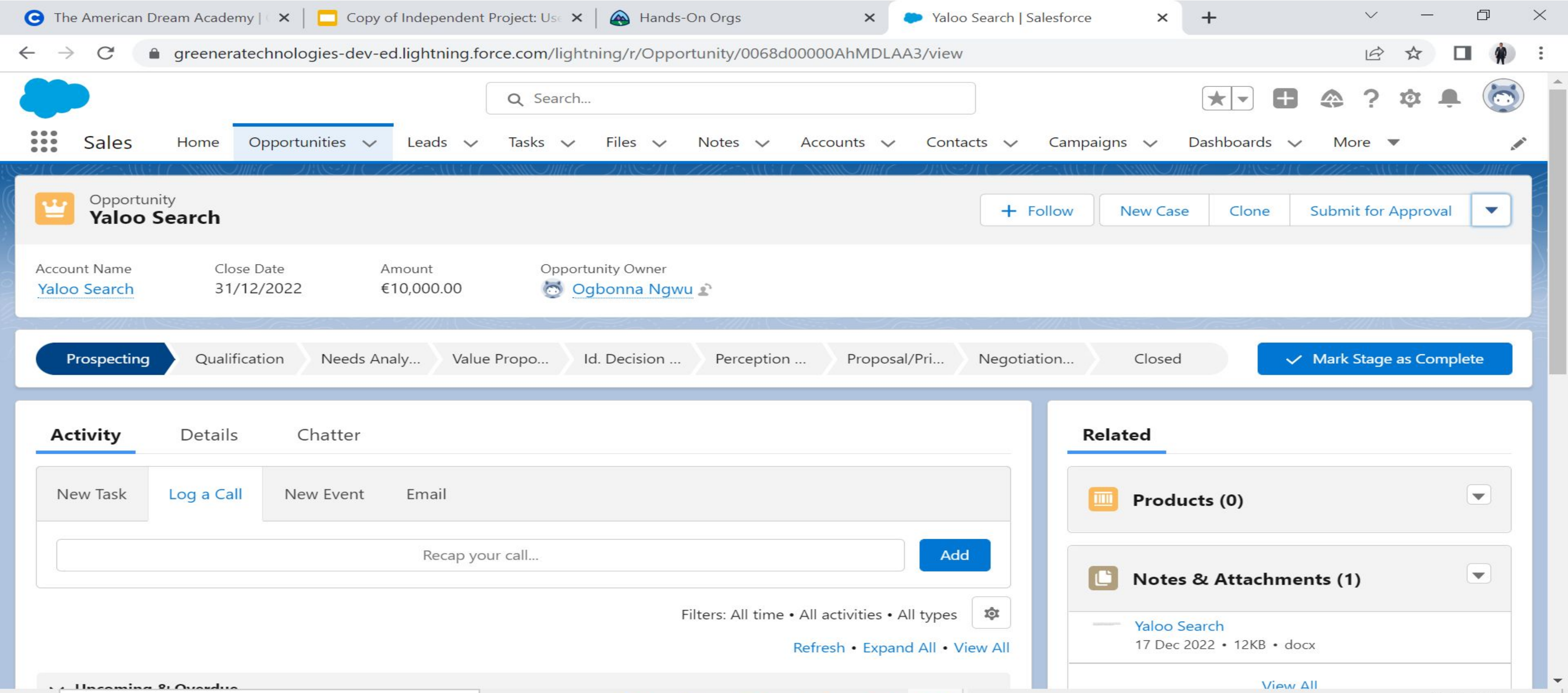
Part A, Task 2: Update Yaloo Search Opportunity Record



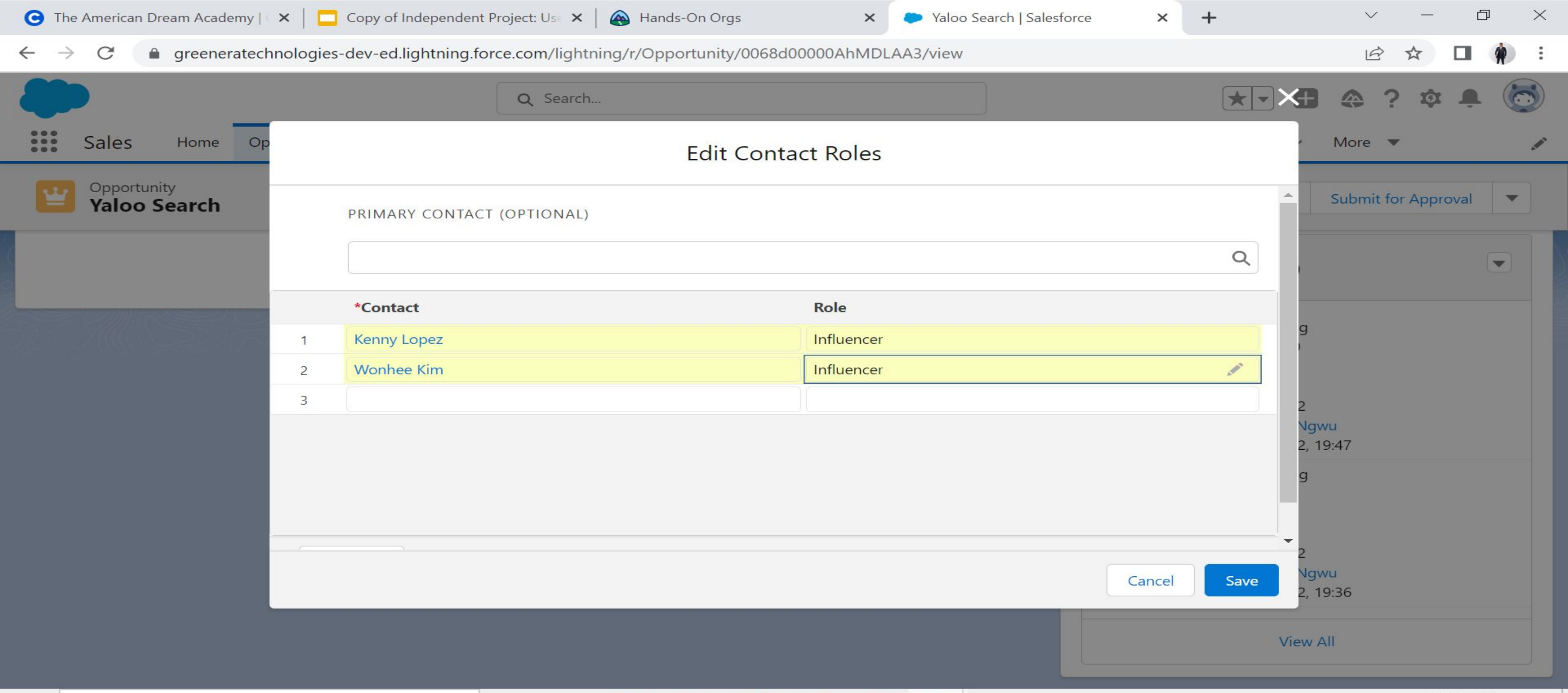
Part A, Task 2: Update Yaloo Search Opportunity Record



Part A, Task 2: Update Yaloo Search Opportunity Record

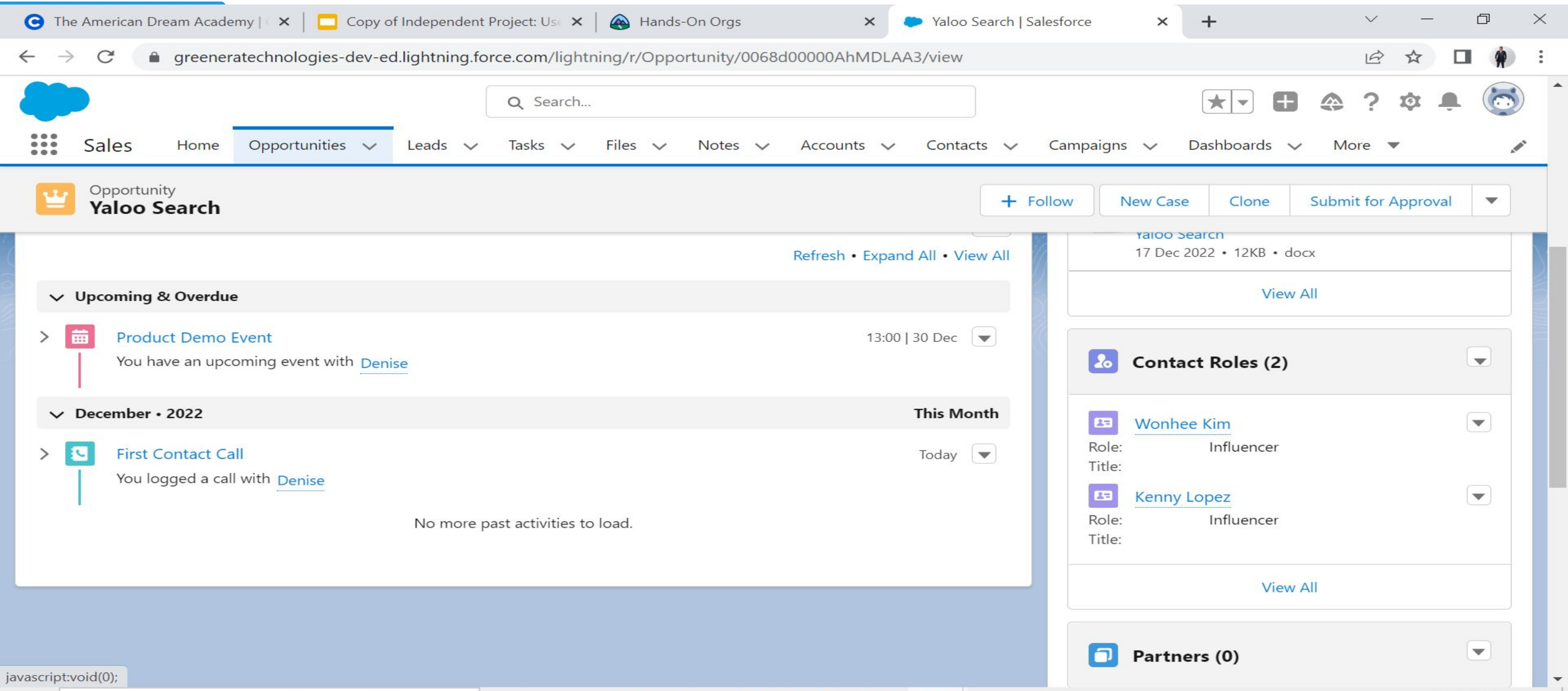


Part A, Task 2: Update Yaloo Search Opportunity Record

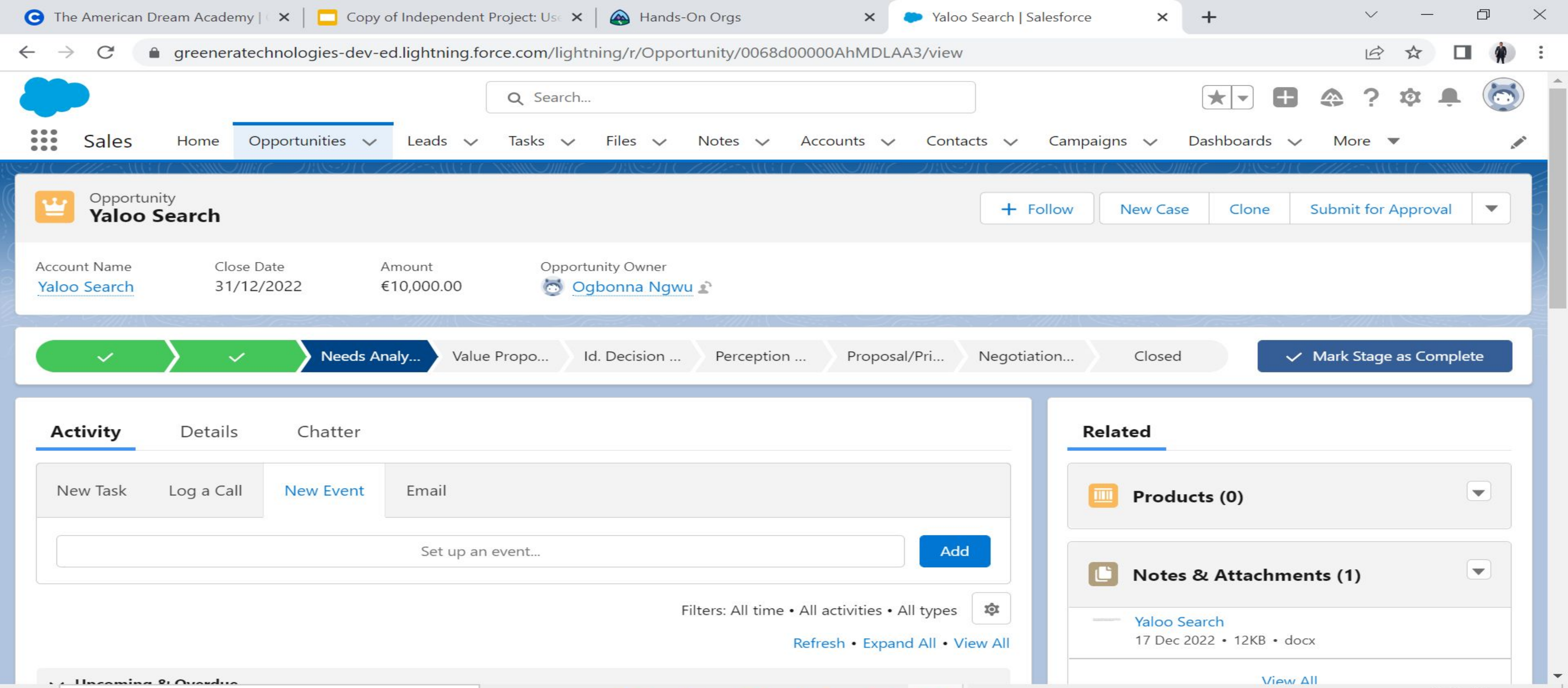


Part A, Task 2:

Update Yaloo Search Opportunity Record



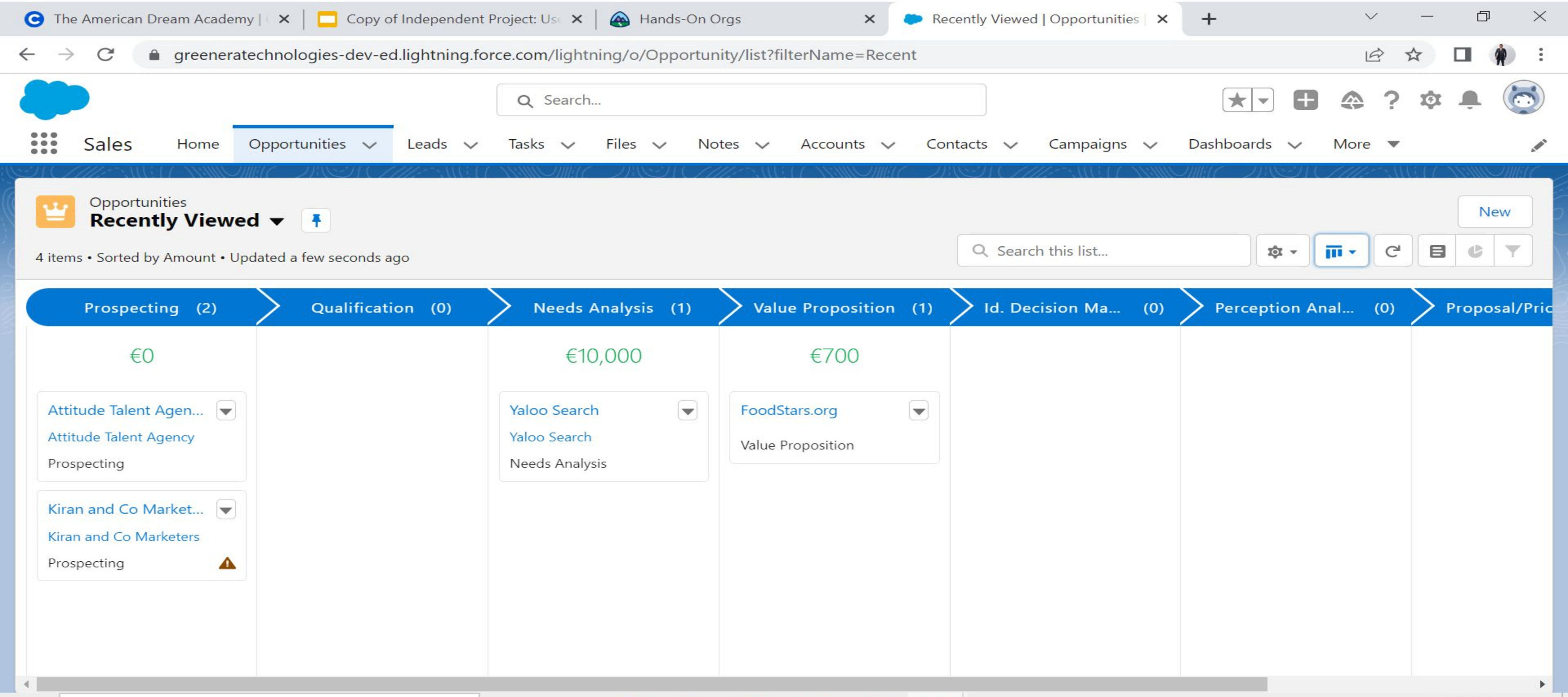
Part A, Task 2: Update Yaloo Search Opportunity Record



Part A, Task 3: Use Opportunity Kanban

Added a screenshot showing the updated opportunity Kanban board on the following slide. I made sure to displays which opportunity stages both the FoodStars.org and Yaloo Search opportunities are in as well as the estimated amounts attached to both.

Part A, Task 3: Use Opportunity Kanban



Part A, Task 4: Business Case Analysis

In a short paragraph, I described how updating opportunity records, progressing opportunities through stages, and using opportunity Kanban in Salesforce would help SimplySocial's team of account executives sell better and more efficiently. In my description,I included:

- The overall purpose of opportunity records, opportunity stages, and opportunity Kanban
- The steps I took to help the AE organize and progress opportunities through the stages.
- How a company like SimplySocial would benefit from using opportunities and opportunity stages

Part A, Task 4: Business Case Analysis

Purpose of Opportunity Records, Stages, and Kanban:

1. *To help AEs have an organised sales Opportunity pipeline*
2. *To make sales process not be random process*
3. *To have central database of sales processes accessible to every member of the sales team.*
4. *To make sales efficient and opportunity stages of sales activity tracked in the eaisest possibel way.*

Steps i took to help AEs organise and progress opportunities.

I showed the AE how to:

1. *log new opportunities into Salesforce*
2. *How to log tasks, calls, events, contact roles and notes into sales and keep track of them all.*
3. *How update opportunity stages in salesforce*
4. *How to use Kanban View to keep track of opportunities in the sales pipeline in visual format.*

How businesses would benefit from using opportunity and opportunity stages:

1. *Though it is not same across businesses but spilitting it in stages will help the AEs to know exactly what stage of sales activity the sales pipeline is currently on and help AEs know exactly what to do/expect next.*
2. *It makes sales activity trackable and easy to review for reference purposes.*

You have reached the end of Part A!

Part B Overview

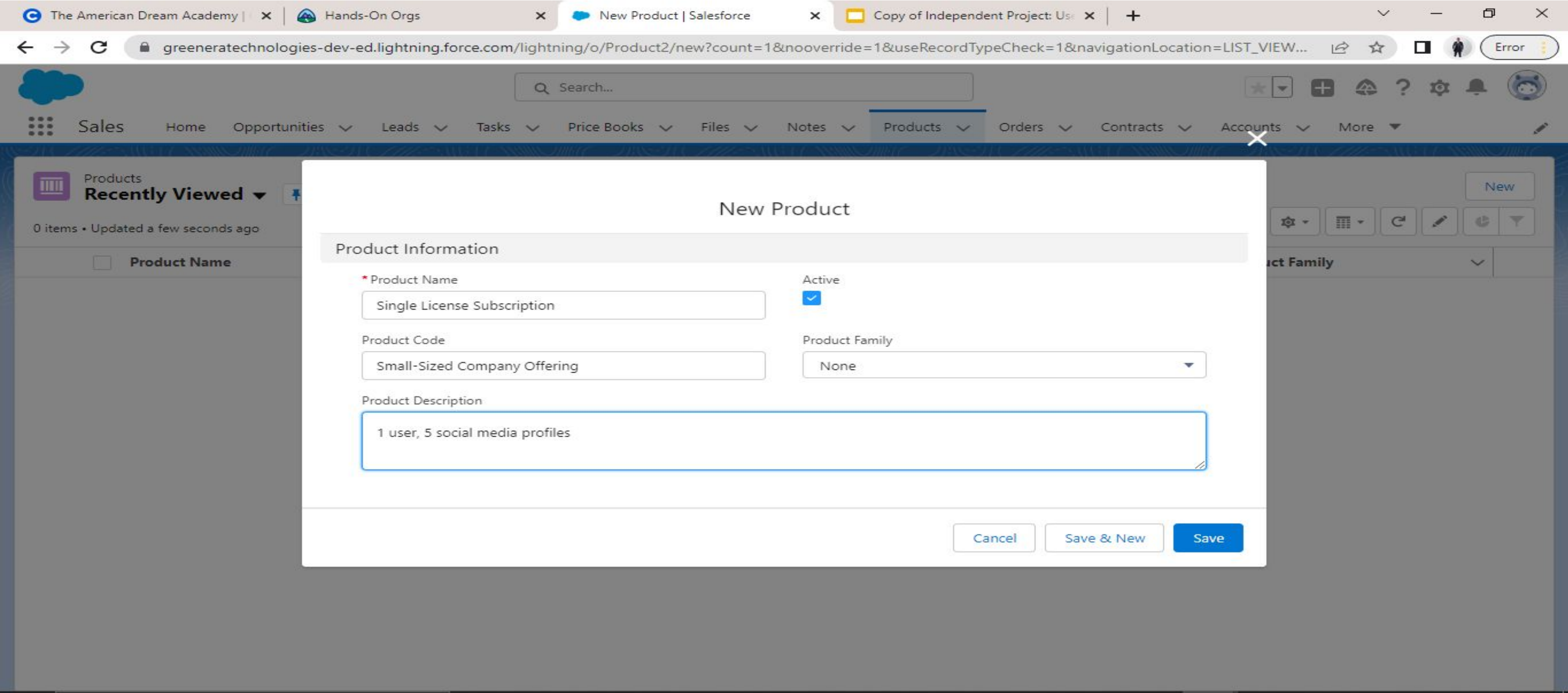
1. **Task 1:** Create Products
2. **Task 2:** Create Standard Price Books
3. **Task 3:** Create Custom Price Books
4. **Task 4:** Associate Price Books With Opportunities
5. **Task 5:** Create Quotes
6. **Task 6:** Send Quotes
7. **Task 7:** Close the Deal
8. **Task 8:** Create Contracts

Part B, Task 1: Create Products

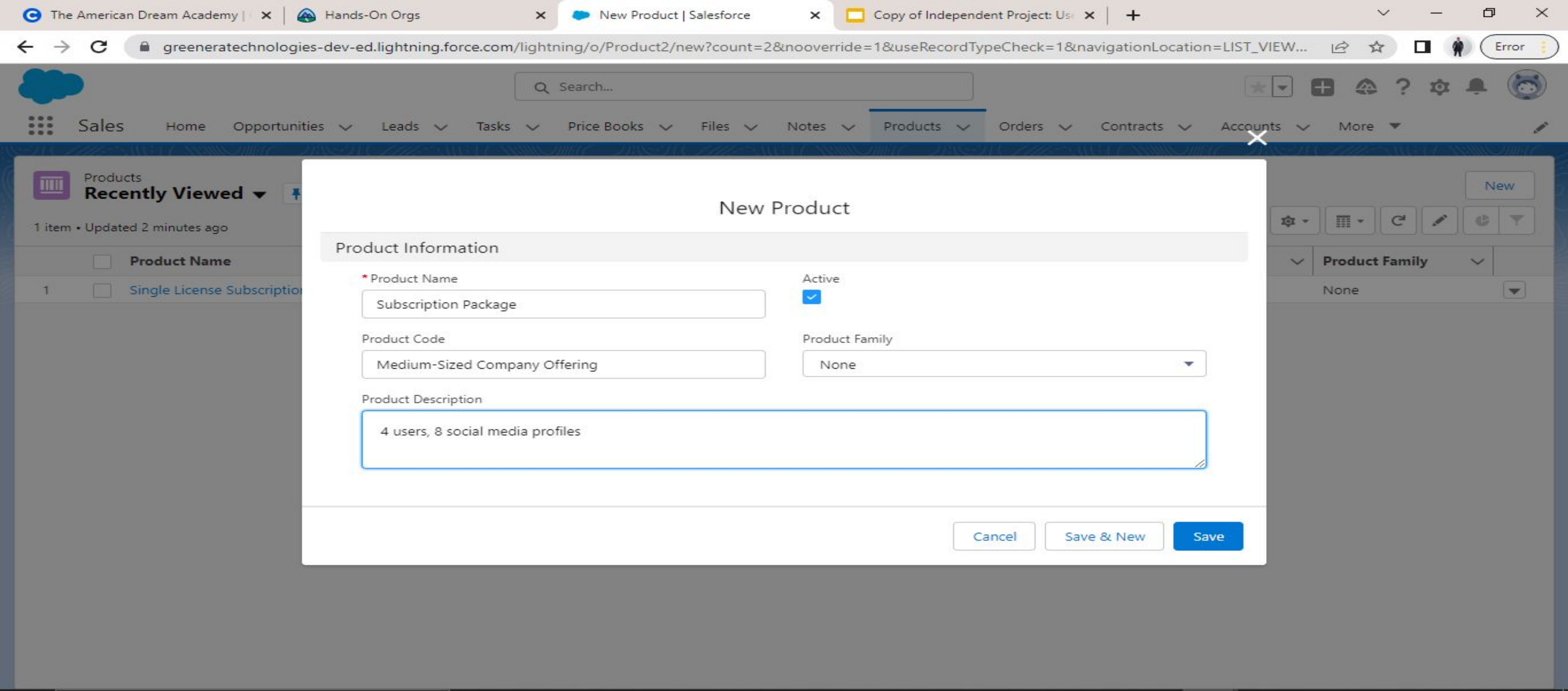
Inserted screenshots for each of the new products I created. Made sure that screenshots of the product record page shows the name of the product as well as all the product details according to the specifications in the instructions.

Step 1: Product record page for the **single license subscription** product
Step 2: Product record page for the **subscription package** product
Step 3: Product record page for the **subscription package plus** product
Step 4: Product record page for the **extra user license** product

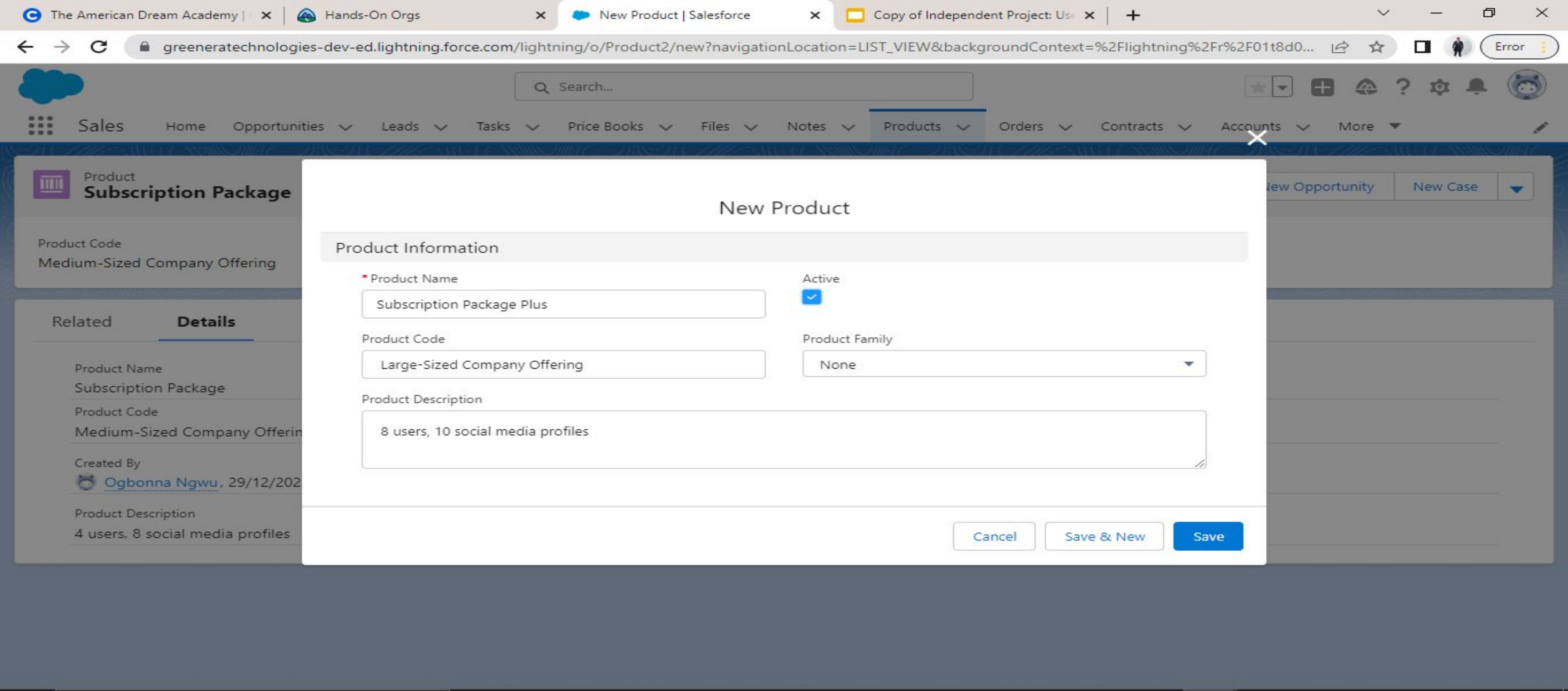
Part B, Task 1: Create Products



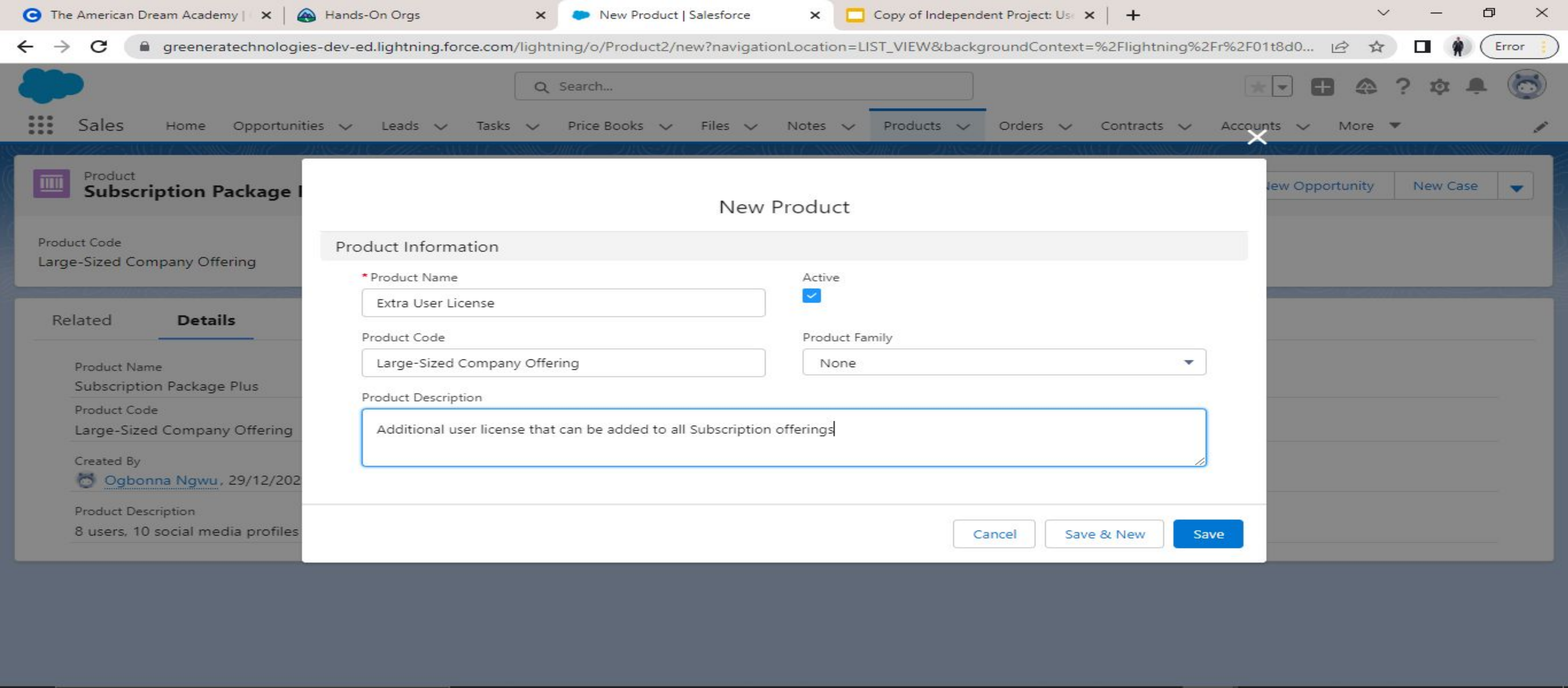
Part B, Task 1: Create Products



Part B, Task 1: Create Products



Part B, Task 1: Create Products



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1	Extra User License	Simple	Large-Sized Company Offering	Additional user license that can be added to all Subscription offerings	None
2	Subscription Package Plus	Simple	Large-Sized Company Offering	8 users, 10 social media profiles	None
3	Subscription Package	Simple	Medium-Sized Company Offering	4 users, 8 social media profiles	None
4	Single License Subscription	Simple	Small-Sized Company Offering	1 user, 5 social media profiles	None

Part B, Task 2: Create Standard Price Books

Added screenshots showing the standard price book entry, or list price, I have added for each of the products I created. I made sure the screenshot shows the name of the product as well as the standard price book and list price entry.

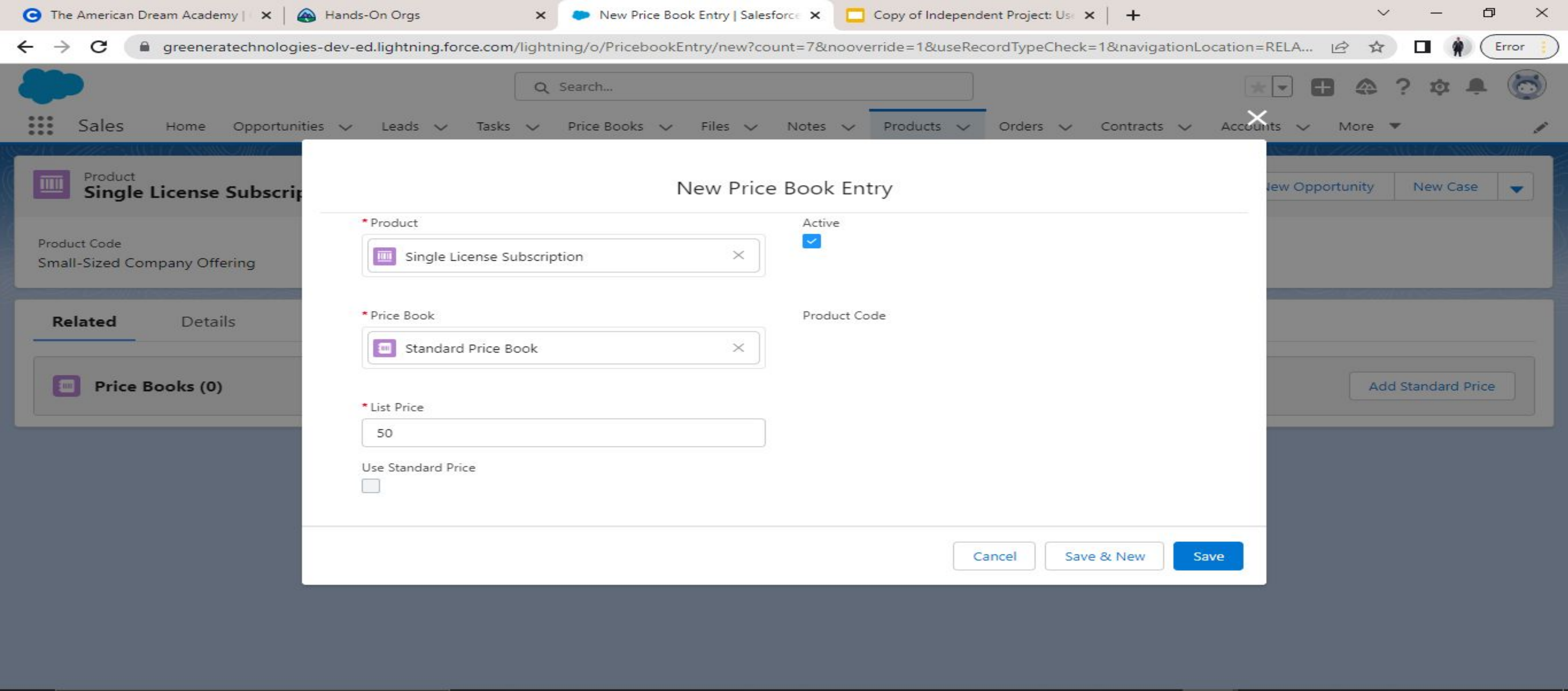
Step 1: Standard price book for the **single license subscription** product

Step 2: Standard price book for the **subscription package** product

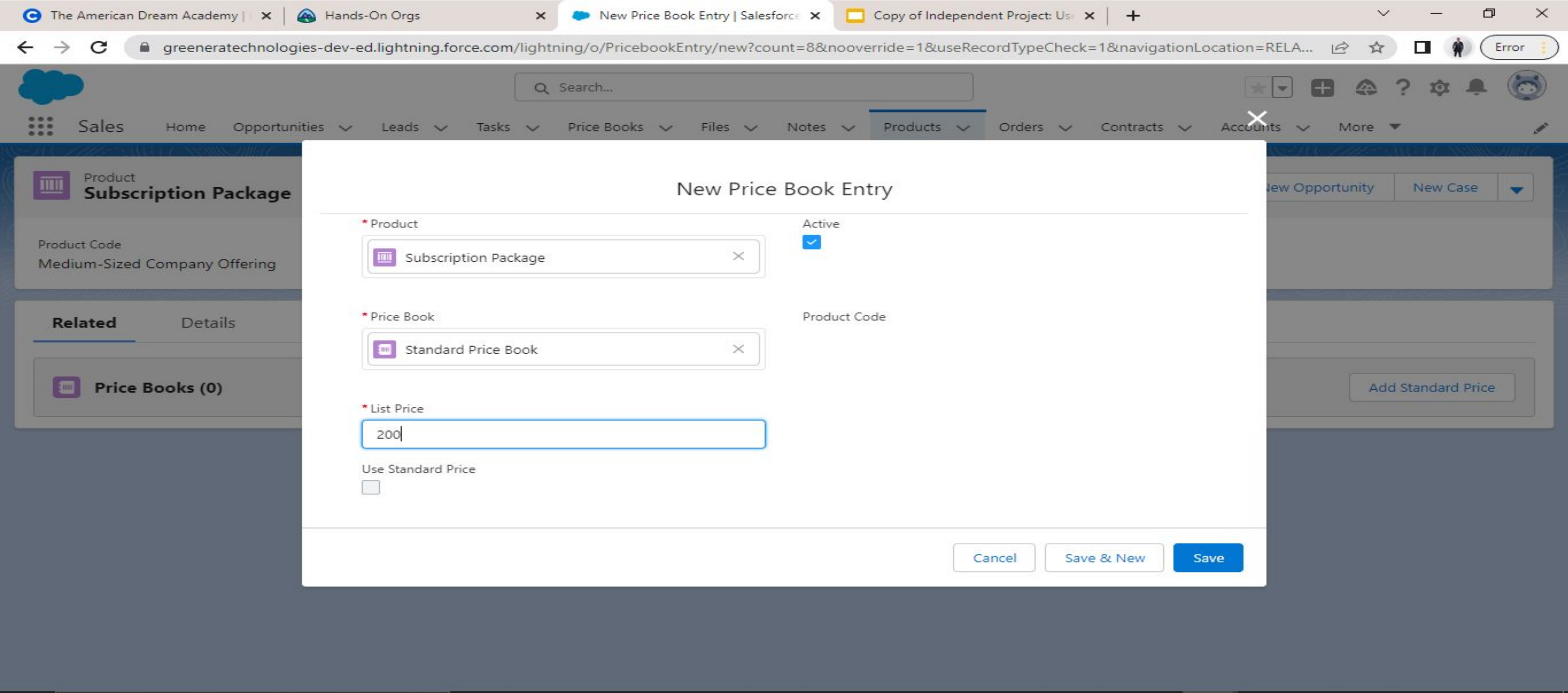
Step 3: Standard price book for the **subscription package plus** product

Step 4: Standard price book for the **extra user license** product

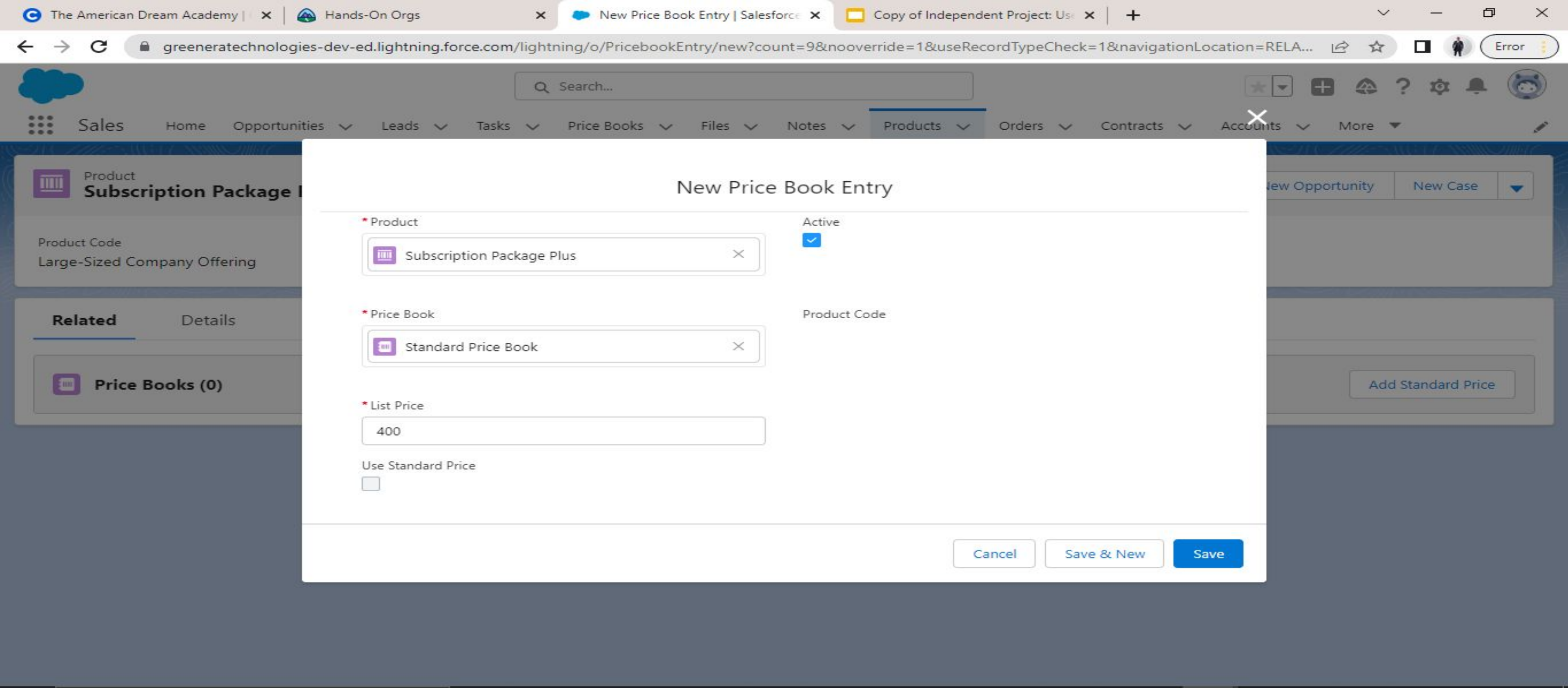
Part B, Task 2: Create Standard Price Books



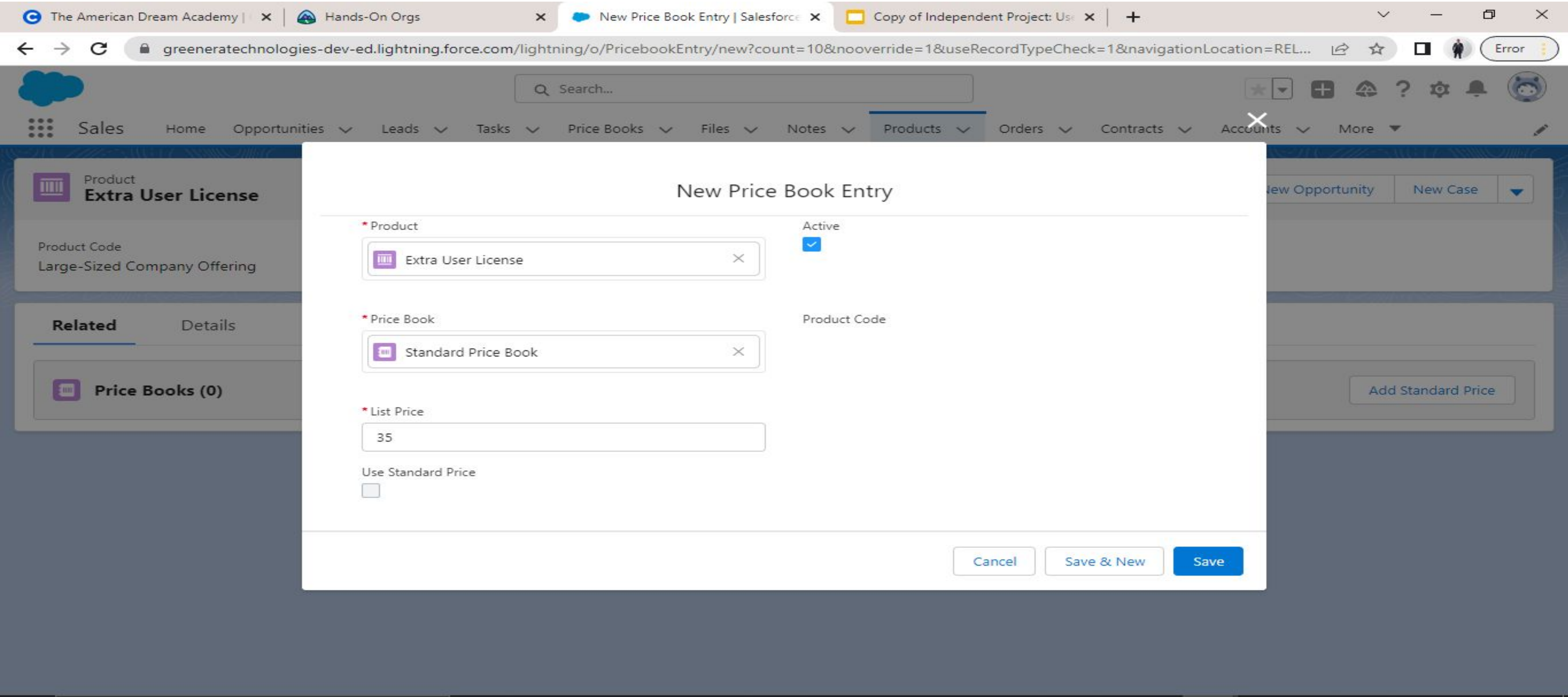
Part B, Task 2: Create Standard Price Books



Part B, Task 2: Create Standard Price Books



Part B, Task 2: Create Standard Price Books



Part B, Task 3: Create Custom Price Books

Inserted screenshots related to the custom price books I created, according to the following steps:

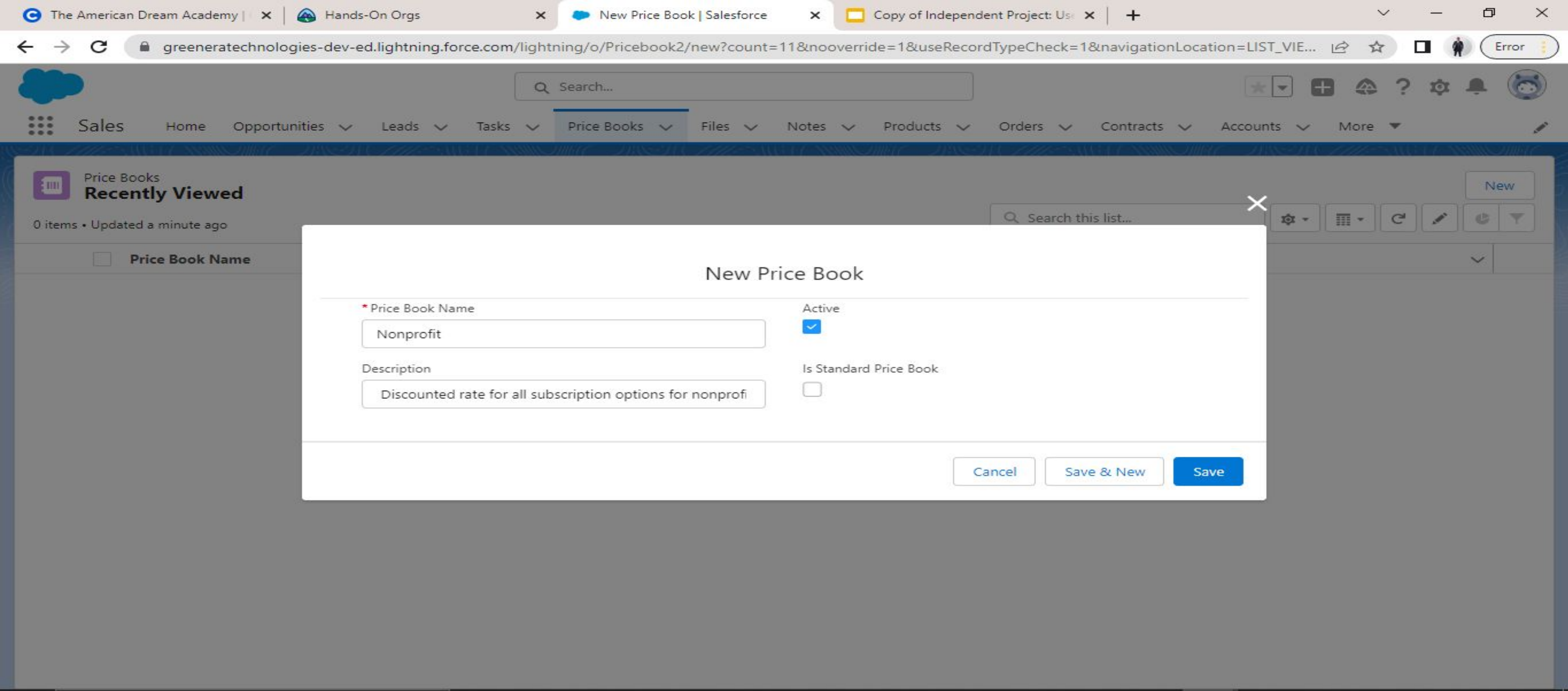
Step 1: The new price book for **nonprofit customers** I just created

Step 2: The new price book for **enterprise customers** I just created

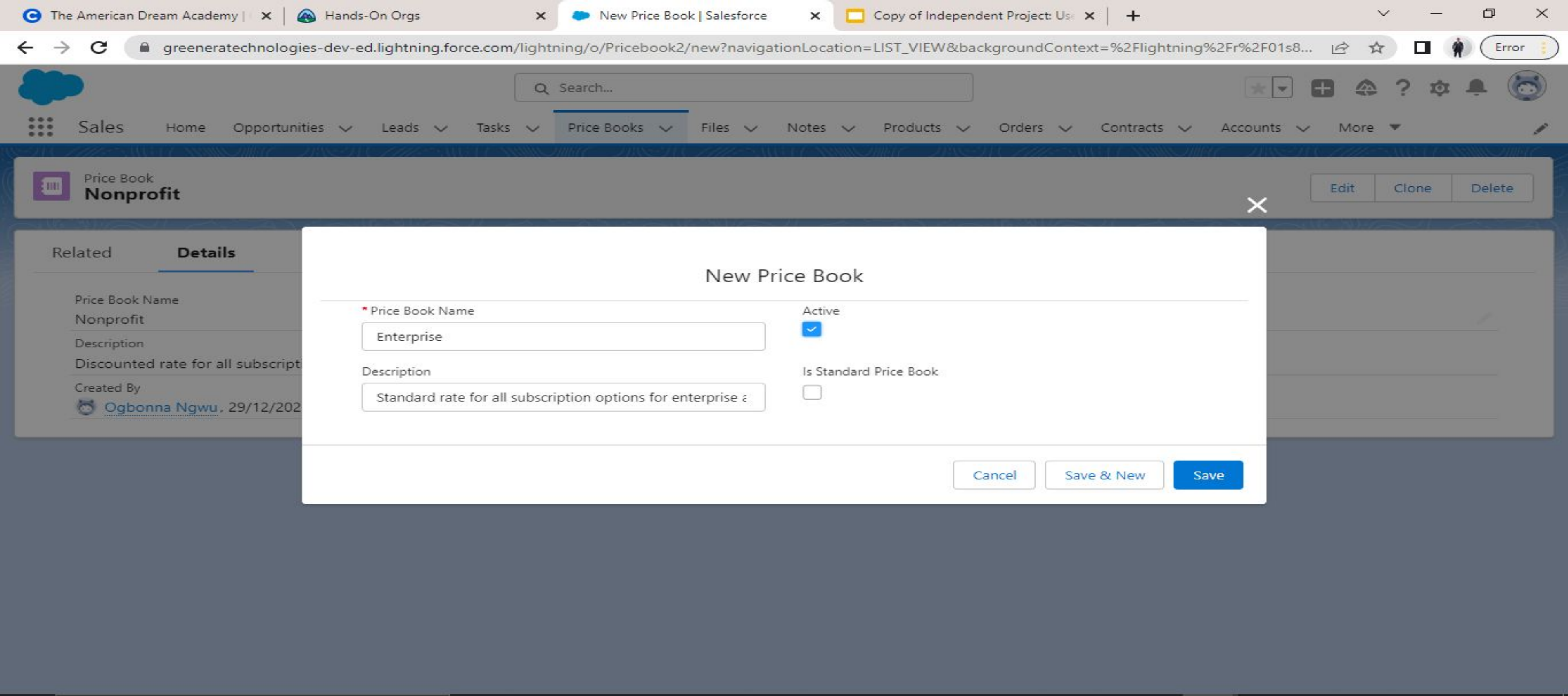
Step 3: The updated price book for enterprise customers with the associated products

Step 4: The updated price book for nonprofit customers with the associated products showing the new prices

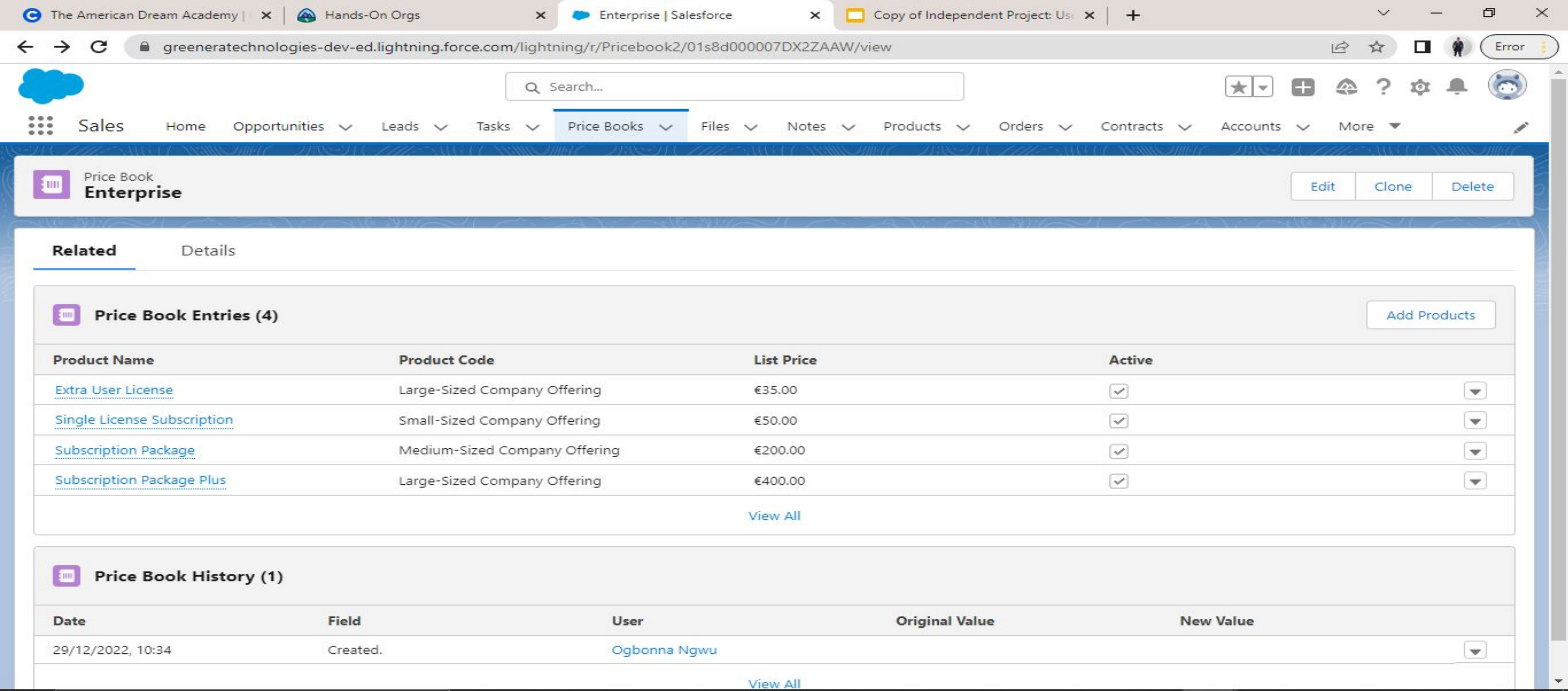
Part B, Task 3: Create Custom Price Books



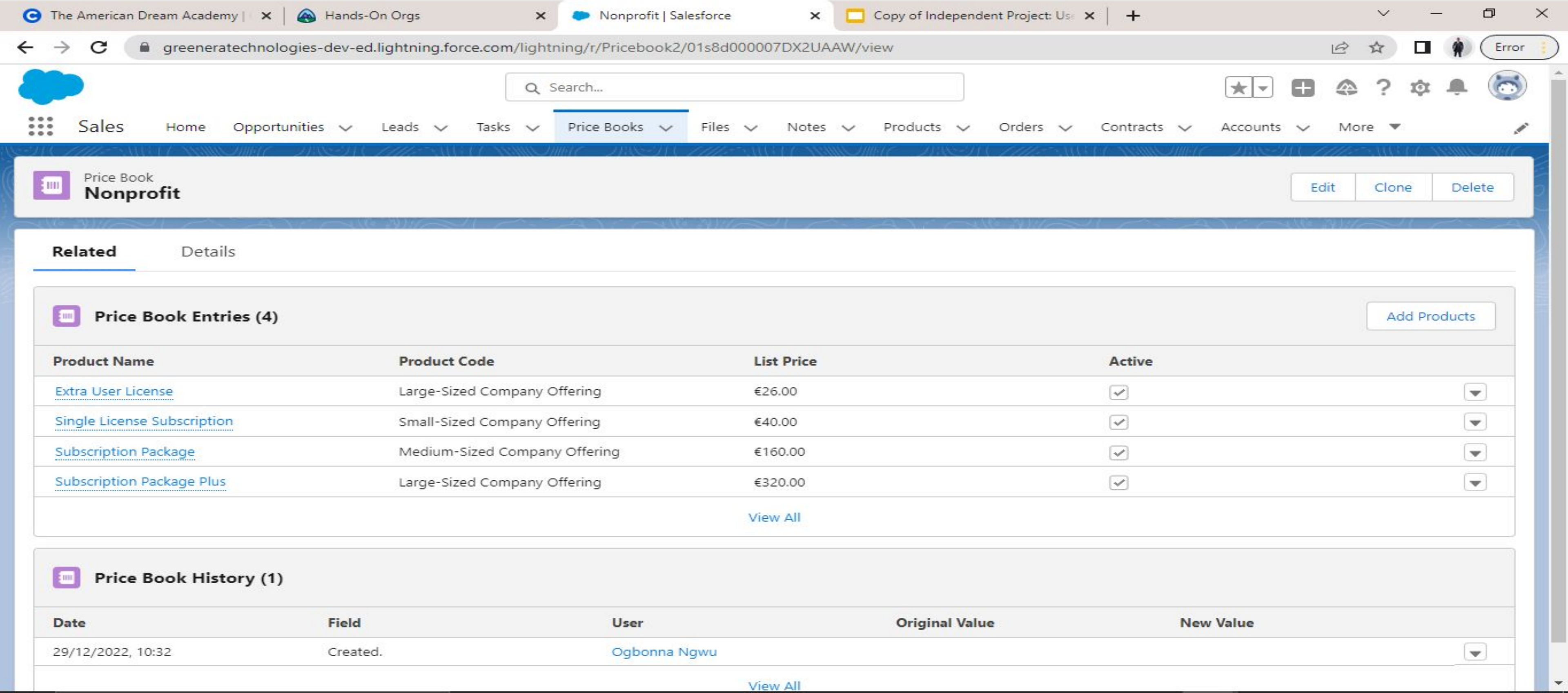
Part B, Task 3: Create Custom Price Books



Part B, Task 3: Create Custom Price Books



Part B, Task 3: Create Custom Price Books



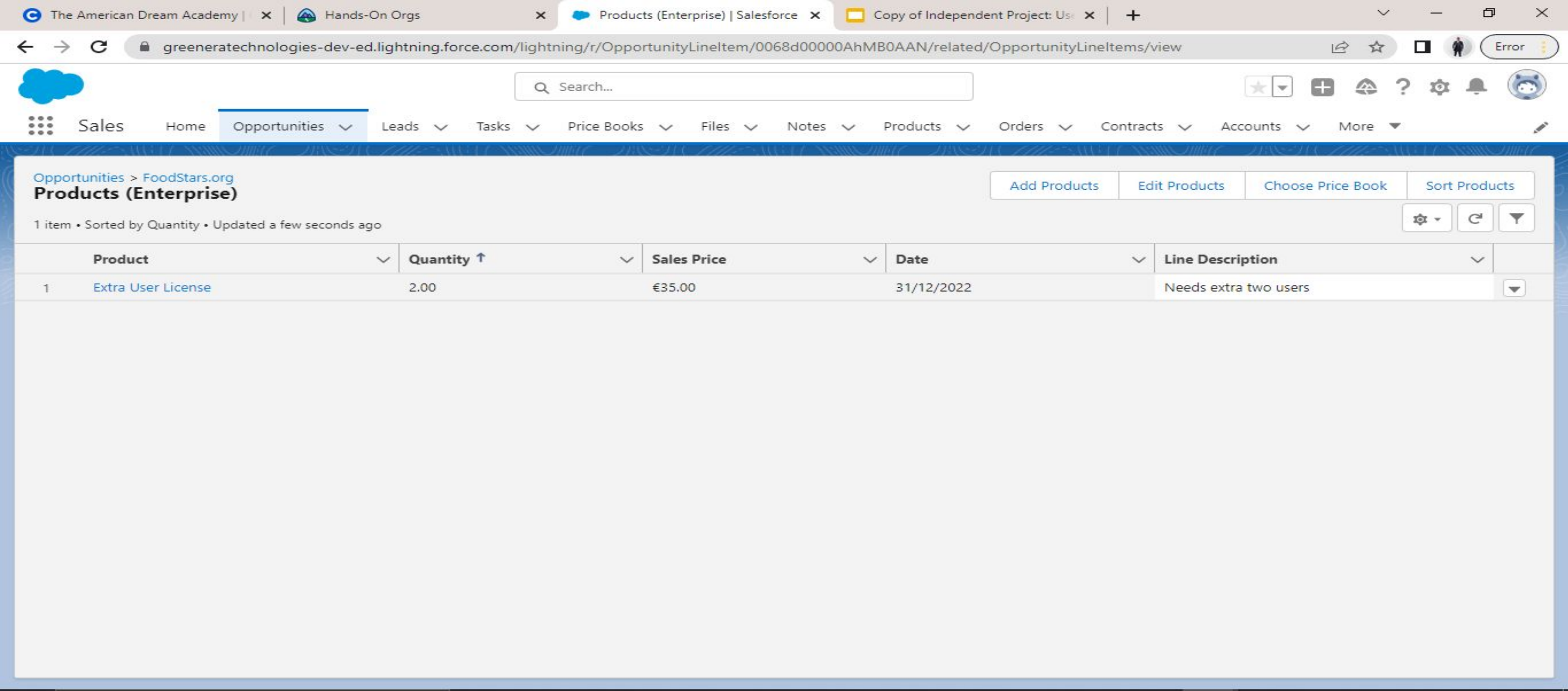
Part B, Task 4: Associate Price Books With Opportunities

I Inserted screenshots of your two in-progress opportunities showing the correct price books and products added to the products section of the opportunity record page. For each screenshot,I ensured the opportunity name is visible, along with the associated products and the correct prices, according to the following steps:

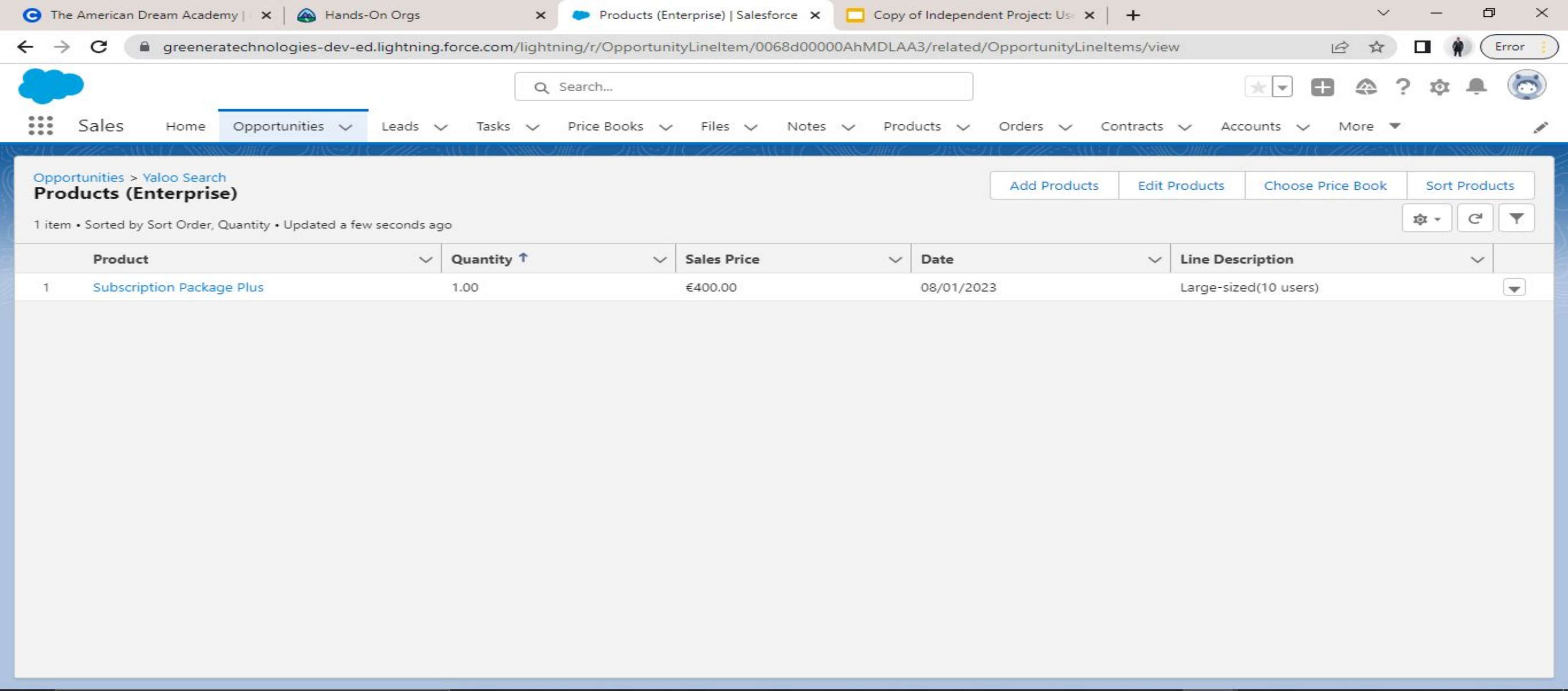
Step 1: FoodStars.Org opportunity record showing products/prices

Step 2: Yaloo Search opportunity record showing products/prices

Part B, Task 4: Associate Price Books With Opportunities



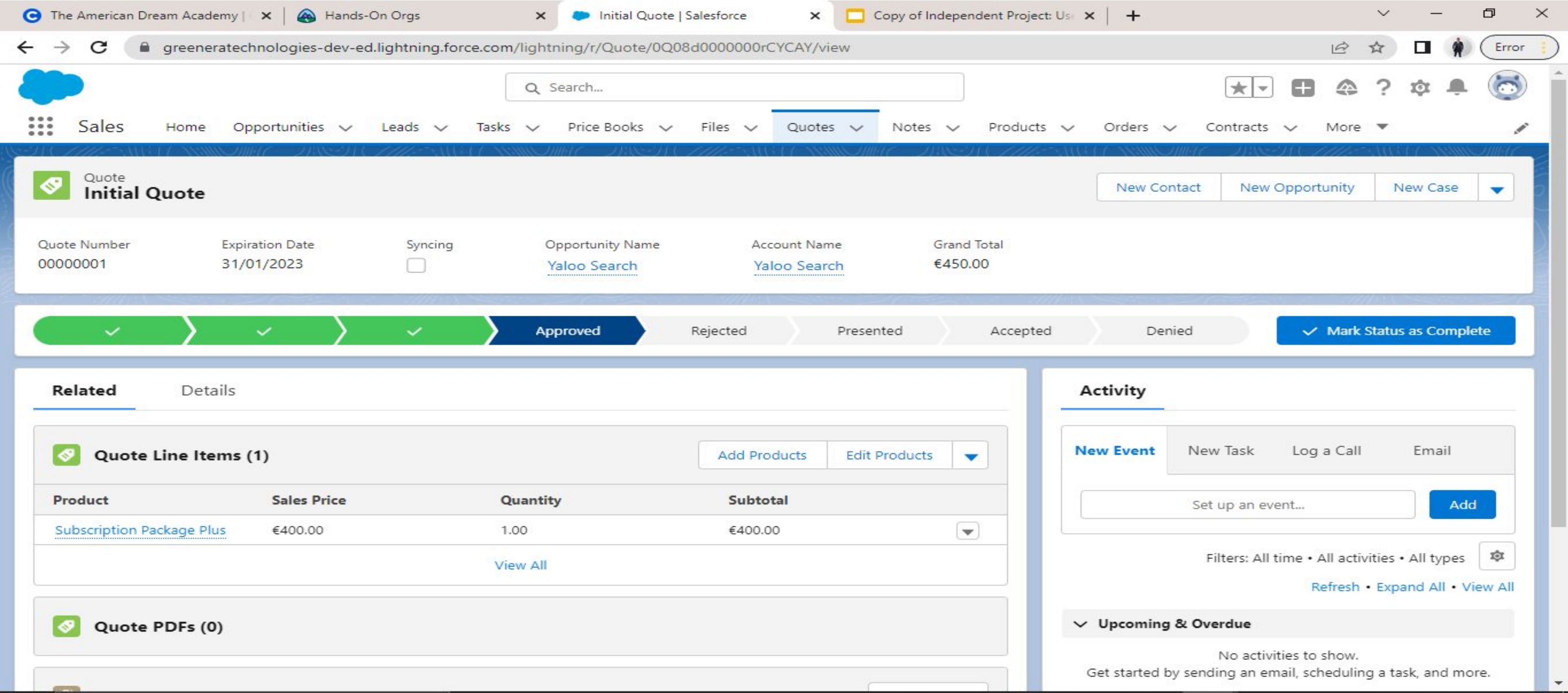
Part B, Task 4: Associate Price Books With Opportunities



Part B, Task 5: Create Quotes

On the following slide, I added a screenshot of the Initial Quote record page for the Yaloo Search opportunity that I just made. I made sure the screenshot shows the name of the quote, the name of the account and opportunity, the quote line items, the grand total, and the updated quote status.

Part B, Task 5: Create Quotes



Part B, Task 6: Send Quotes

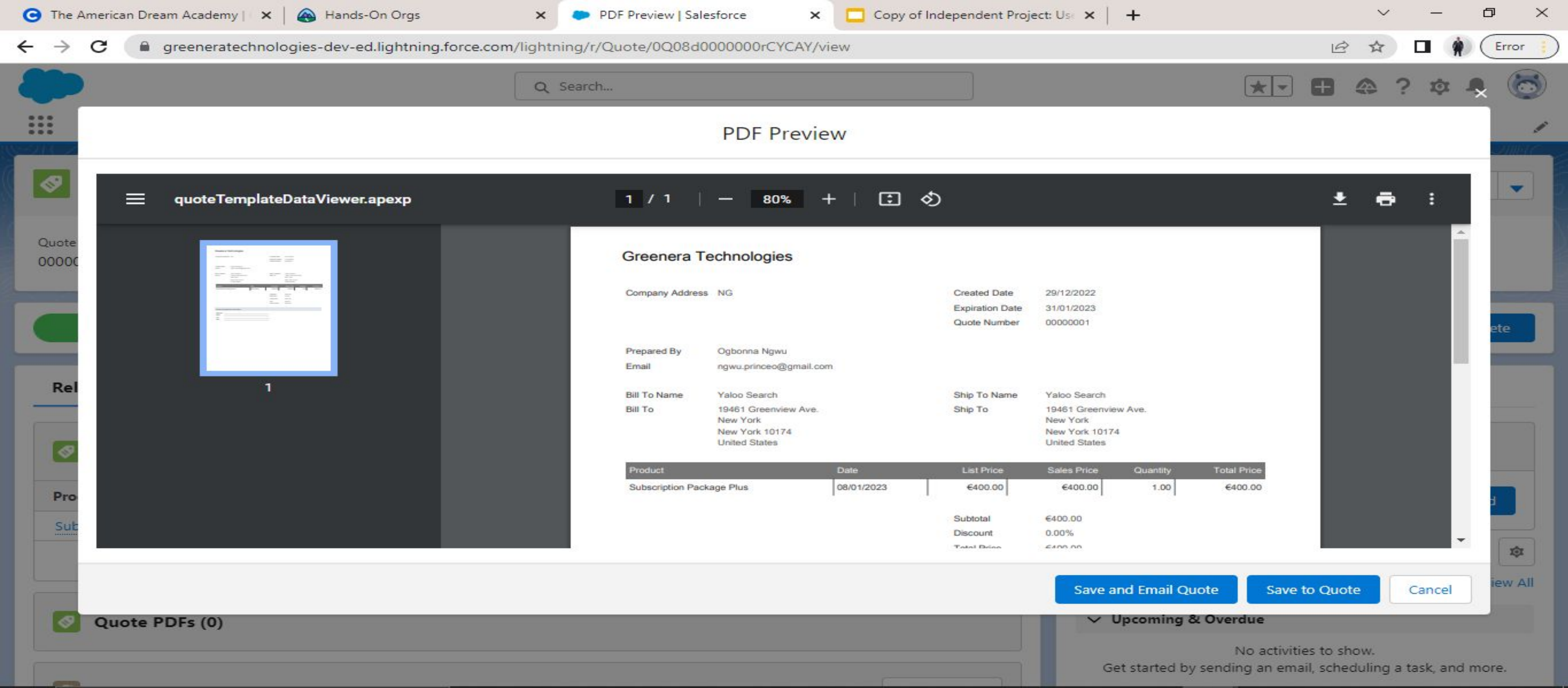
Inserted screenshots related to the quote I generated on the following slides.

Step 1: The **PDF preview** of the initial quote

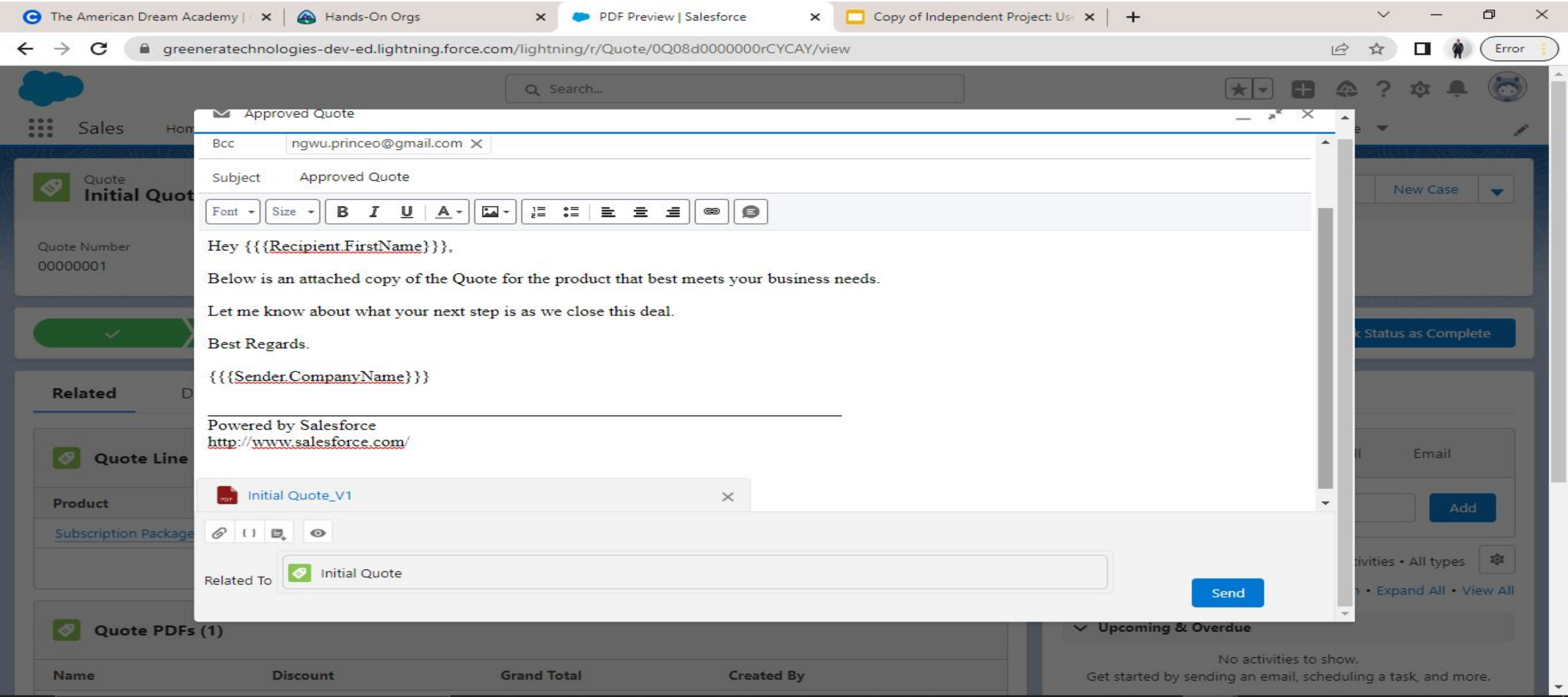
Step 2: The **draft email containing the PDF** of the initial quote that I will send to Denise.

- *Made sure that the PDF attachment is visible in the email.*

Part B, Task 6: Send Quotes



Part B, Task 6: Send Quotes



Part B, Task 7: Close the Deal

Inserted screenshots on the following slides showing I have correctly closed the Yaloo Search and FoodStars.org opportunities.

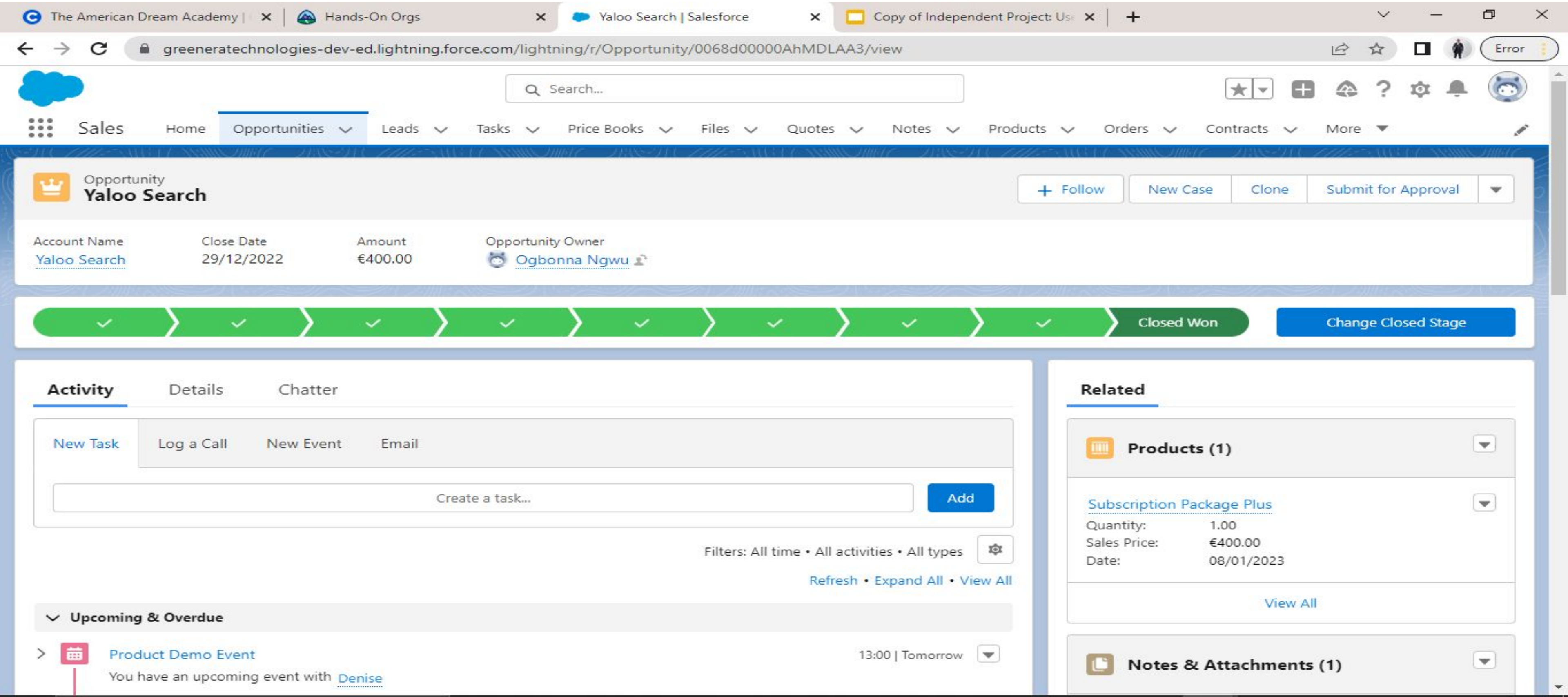
Step 1: Close the **Yaloo Search opportunity** as won.

- *Ensured the screenshot shows the opportunity stage status updated accordingly.*

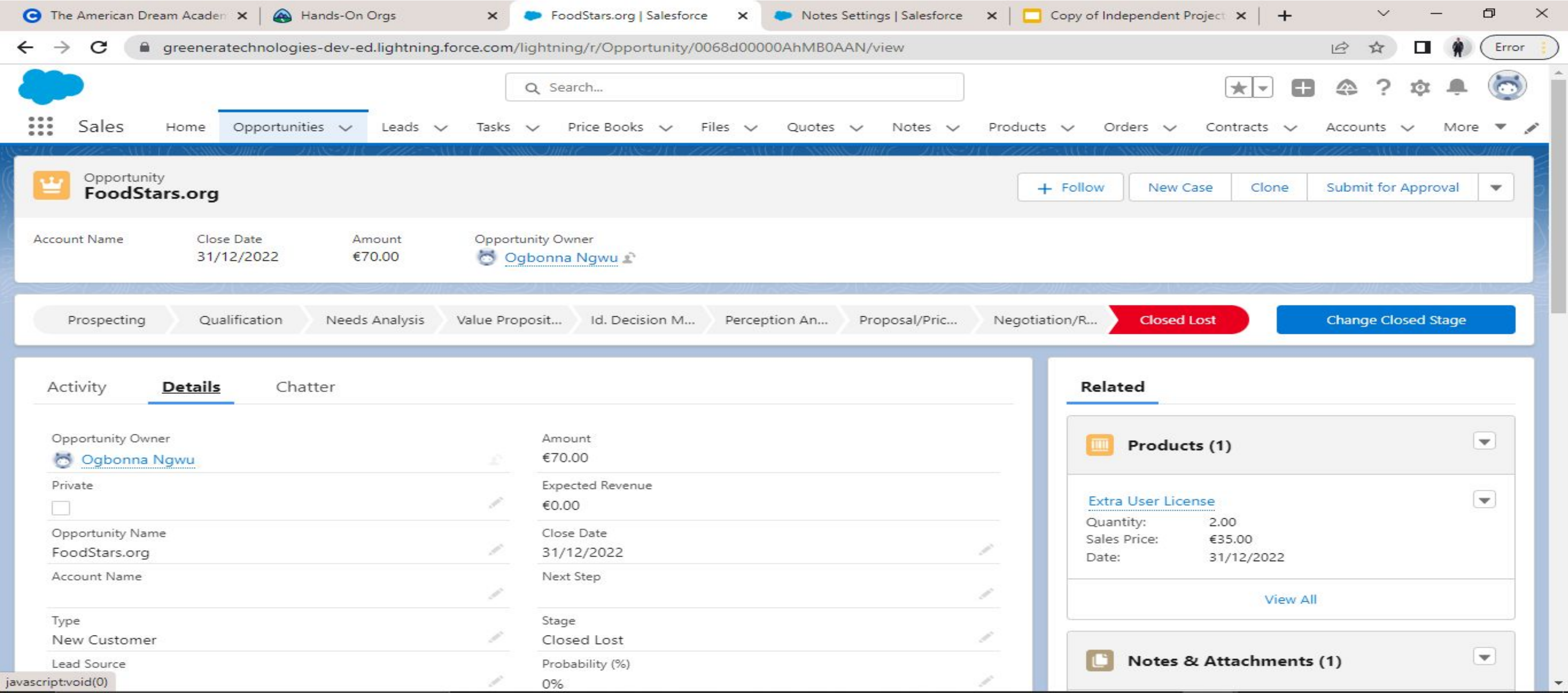
Step 2: Close the **FoodStars.org opportunity** as lost.

- *Ensured screenshot show the opportunity stage updated accordingly and the note I created explaining why it was closed.*

Part B, Task 7: Close the Deal



Part B, Task 7: Close the Deal



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why not converted
29/12/2022, 11:40 by Ogbonna Ngwu
Hard no need for our product as a new CEO took over

why not converted
29/12/2022, 11:38 by Ogbonna Ngwu
Sandro had a meeting scheduled with Janet set for Nov 19th, but he received an email from her saying that her team is actually...

why not converted
03/12/2022, 12:41 by Ogbonna Ngwu
Martha New didn't answer the first call, so Sandro tried calling again per the task created in Salesforce earlier. They did n...

initial call summary
03/12/2022, 07:48 by Ogbonna Ngwu
Director of marketing operations at a large company so it's likely that there are multiple stakeholders we'll need to appeal to. Follo...

call summary
03/12/2022, 07:44 by Ogbonna Ngwu

follow-up call notes
03/12/2022, 07:30 by Ogbonna Ngwu
Has a social media marketing tool that she is satisfied with but has some definite needs that SimplySocial's tool can solve that hers...

why not converted

Visibility Set by Record

Hard no need for our product as a new CEO took over

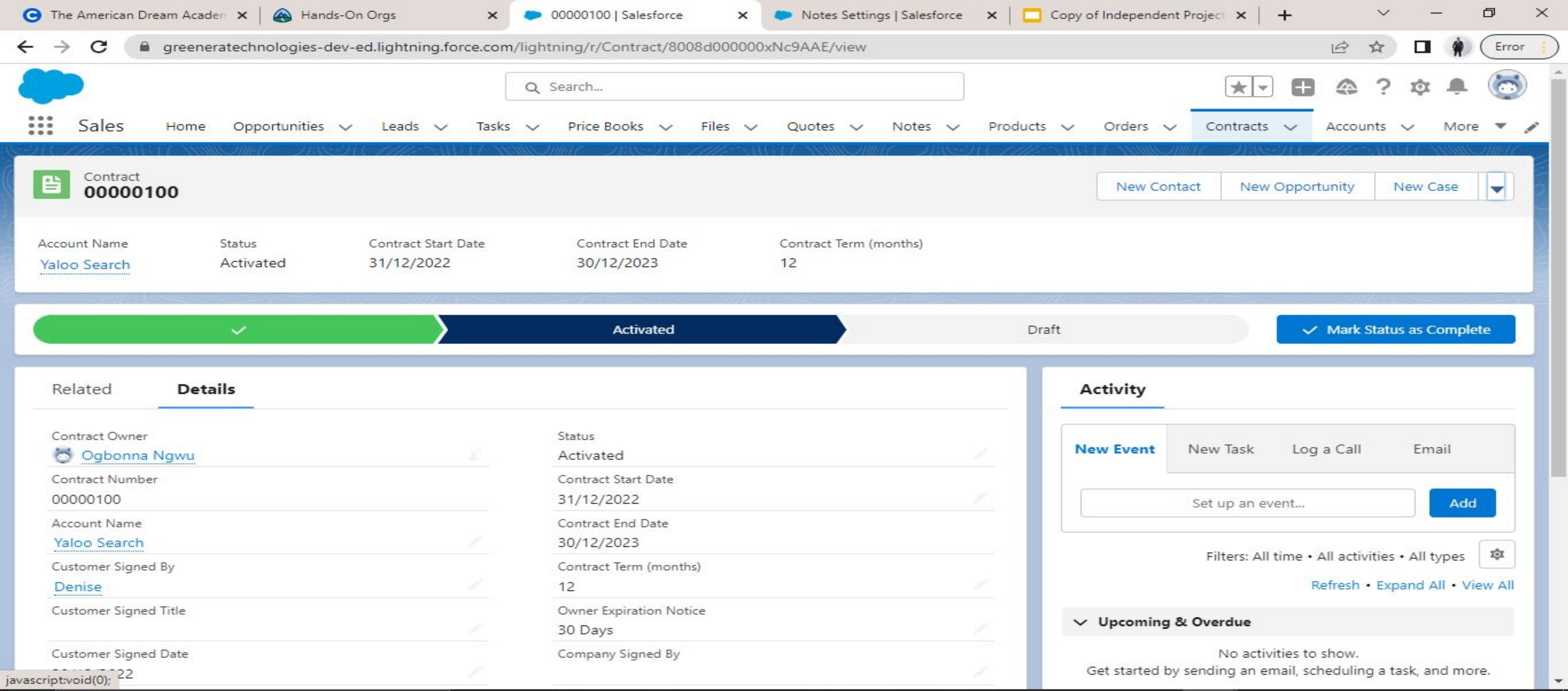
Related to FoodStars.org

View Version History | Delete | Share | Add to Records

Part B, Task 8: Create Contracts

On the following slide, I inserted a screenshot of the new contract for Yaloo Search that I just created, ensuring the account name, status, and contract term are visible.

Part B, Task 8: Create Contracts



You have reached the end of Part B!