Create New Opportunities QRG

SALES ACADEMY

New Opportunities Overview

This QRG is designed to help you create and maintain Opportunities in the Australia Post pipeline.

When do I perform this?

All sales professionals at Australia Post will be responsible for the accuracy and completeness of pipeline information in Salesforce.com.

What has to happen before I perform this?

You should be trained on the Australia Post Sales Process before managing opportunities in Salesforce.com.

Prerequisites

You need access to Salesforce.com.

Create a New Opportunity

If there is the possibility that a new prospect organisation or existing customer may to do some business with Australia Post, an Opportunity record must be created in the Salesforce.com.

The following steps outline how to create a new Opportunity.

1. Click the **Opportunity** Navigation Tab.
2. Click New

The **New Opportunity** screen displays.

Opportunity fields are described in the table below; edit or validate fields as required. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field Information

Click i next to any field it is adjacent to for more information on the field and its intended contents.

Field	Definition
Opportunity Information	
Opportunity Driver	The name of the person creating the Opportunity. This is a read only field.
Stage	Current Stage or status of the Opportunity. This relates to the 6 stages of the Australia Post Sales Process. • Click the drop-down menu and select the appropriate option. You can also view details of the sales stages by clicking Sales Coach
Opportunity Name	Name of the opportunity. • Click in the field and type a suitable name.
Name	Name of the Organisation or Individual the Opportunity relates to. • Click to and use lookup to find the required Individual or Organisation.
Probability %	Percentage of estimated confidence in closing the opportunity. The **Probability %** value is always updated by a change in the **Stage**.
Offering Type	• Click the drop-down menu and select the relevant option.
Expected Start Date	The date from which the opportunity is expected to start generating booked revenue (approximate). • Click in the field and use the calendar to select the start date.
Organisation Sector	This is carried over from the associated Organisation. • Click in the field and type the relevant information.

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Field	Definition
Close Date	Date when you plan to close the Opportunity. • Click in the field and use the calendar to select the Opportunity close date. When you select the **Closed/Won** stage, the Close Date is set to the current date.
Key Contact	The Key Contact at the Organisation.
Type	Type of Opportunity. • Click the drop-down menu and select the relevant option.
Financial Information	
Annual Value (previously Amount)	Estimated total sale amount. • Click in the field and type an appropriate value.
Opportunity Costs	Possible costs incurred in pursuing the Opportunity. • Click in the field and type an appropriate value.
Total Contract Value (Previously Expected Revenue P.A.)	• Click in the field and type an appropriate value.
CAPEX	Possible CAPEX investment required if Opportunity is successful. • Click in the field and type an appropriate value.
Customer Budget	• Click in the field and type an appropriate value.

Field	Definition
Profitable	Indicator denoting the potential profitability of the Opportunity. • Click the check-box.
Additional Information	
Group	• Click the drop-down menu and select the relevant option.
Account Plan	• Click and use Lookup to select the correct Account Plan.
Lead Source	Source of the opportunity. • Click the drop-down menu and select the relevant option.
Competitive Bid	If the Opportunity is a competitive bid, indicate this here. • Click the check-box.
Priority	• Click the drop-down menu and select the relevant option.
Primary Campaign Source	Name of the campaign the Opportunity was generated in response to. • Click and use Lookup to select the relevant Campaign.
Contract Service Flag	If any part of the opportunity is contract service, indicate this here. • Click the check-box.
Commercial Risk	If an assessment suggests there is a possible commercial risk with the Opportunity, indicate this here. • Click the check-box.
Bid Master File Number	• If available, click in the field and type the relevant value.

Field	Definition
Assessment Details	
Key Drivers	Drivers behind the Customer's interest. • Click in the field and type any information.
Expected Benefits	Expected benefits of the Opportunity. • Click in the field and type any relevant information.
Marketing Focus Aligned	A detail of how the Opportunity is aligned to Australia Post's marketing focus. • Click in the field and type any relevant information.
Opportunity Impact	Impact to Australia Post if this Opportunity is not pursued. • Click in the field and type any relevant information.
Value Proposition	
Value Proposition	Details of Australia Post's value proposition and products and/or solution offering relating to the Opportunity. • Click in the field and type any relevant information.
Internal Resources	Details of internal resource requirements to deliver this Opportunity. • Click in the field and type any relevant information.
Service delivery capabilities	
Previous Delivery	Details of a track record of similar types of Opportunities. • Click in the field and type any relevant information.

Field	Definition
Confirmed Capacity	Confirmation of capacity to meet the requirements of the Opportunity. • Click the checkbox.
Meet Capabilities	Confirmation Australia Post can meet the requirements of the Opportunity with current capabilities. • Click the checkbox.
Execution Plan Developed	Confirmation an execution plan has been developed. • Click the checkbox.
Meet Timeframe	Confirmation Opportunity requirements can be developed in the agreed timeframe. • Click the checkbox.
Next Steps	
Next Steps	Details of next steps to be undertaken to pursue the Opportunity. • Click in the field and type any relevant information.
Expected Activity End Date	• Click in the field and use the calendar to select the relevant date.
AusPost Resourcing	• Click in the field and type any relevant information.
Opportunity Validation Driver	Group who will drive the Opportunity once it is validated. • Click the drop-down menu and select the relevant option.
Has Activity Begun?	Denotes if work has already begun on the Opportunity. • Click the check-box.

Field	Definition
Bids & Tenders Involvement	Denotes if the Solutions and/or Bids & Tenders teams need to be involved in the Opportunity. • Click the check-box.
Description Information	
Description	Description of the Opportunity. • Click in the field and type any relevant information.

3. Click Save & Add Product

- To cancel out without saving, click Cancel

The **Product Selection** screen displays.

Select Products

The following steps outline how to select Products for the Opportunity.

1. Use the filters to specify search criteria to locate the required Product, then click Search

Products matching the entered search criteria display.

2. Click the checkbox adjacent to one or more Products to be added to the Opportunity.
3. Click Select

- To cancel out without saving, click Cancel

The **Add Products to Opportunity** screen displays.

Add Products to Opportunity fields are described in the table below; edit or validate fields as required for each Product. Mandatory fields are **bolded**; instructions for completing each field are presented in bullet points.

Field	Definition
Quantity	Quantity of each Product type. • Click in the field and type the relevant value.
Sales Price	Price of each Product type according to the selected Price Book. For estimation purposes, if **Quantity** and **Sales Price** are known then use both. If **Quantity** is unknown, then type 1 in the **Quantity** field and type the best estimate of potential total revenue for this product line in the **Sales Price** field
Start Date	• Click in the field and use the calendar to select the relevant date.
Line Description	Only use this field to provide further information. • Click in the field and type any relevant information.

4. Click Save

- To cancel out without saving, click Cancel
- To save and add further Products to the Opportunity, click Save & More

The Opportunity is created in Salesforce.com.