# Work with Opportunities QRG

## Work with Opportunities Overview

This QRG is designed to help you manage Opportunities through their lifecycle.

### 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.

## Opportunities

### Locating Opportunities

The following steps outline how to begin to work with Opportunities.

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

Opportunities you have recently viewed display in the **Recent Opportunities** section; you can filter these using the **Recent Opportunities** drop-down menu. Filtering options are:

- Recently Viewed
- Recently Modified
- Recently created

Use the Views drop-down menu to filter the list of Opportunities to show specific results; for example, Closing this Month, New this Week, Won etc.

You can also click **Create New View** to create your own views to filter Opportunities.

2. Locate the required Opportunity and click the **Name** link.

The Opportunity details display.

As information is added to Salesforce.com, more meaningful insights will be generated via reports, dashboards and other outputs.

## Opportunity Knocks

Scrolling down, there are a number of sections on the Opportunity screen providing you with a range of details.

You will be required to edit, add to and update details in these sections of the Opportunity over the course of its life.

### Sales Coach

Sales Coach is available in all Opportunities as a guide for you through the sales process that includes:

- A **Stage Description** that includes Activities you need to complete to move the Opportunity to the next stage in the sales process
- Information on when the current Opportunity stage is complete
- Information on how to verify if the Opportunity stage is complete and it is ready to move to the next stage in the sales process.

Click Sales Coach to use Sales Coach.

### Opportunity Assessment Summary

The following steps outline how to generate an Opportunity Assessment Plan summary.

1. Click Generate Summary

A PDF version of the Opportunity Assessment Plan summary displays. This can be saved and printed, emailed etc.

### Opportunity Detail

The Opportunity Detail section displays basic Opportunity information such as Financial Information, Assessment Details and Next Steps.

Information in this section is usually entered when the Opportunity is created; though you are encouraged to edit these details as required over the life of the Opportunity. See the Create New Opportunities QRG for more information on the fields in this section.

The following steps outline how to manipulate the information that displays in the Opportunity Detail section:

- Gain some screen real estate by clicking ▼ to collapse any section.
- Expand collapsed sections by clicking ▶

- Edit any field in the Opportunity Detail section by double clicking to open **In Place Editing**.

**Field Help**

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

## Products

Products are the individual items that you sell on your opportunities and quotes.

- Click any Product **Name** to view further information.
- Click Add Product to add Products to the Opportunity.
- Click Edit All to edit existing Products associated with the Opportunity.
- Click Choose Price Book to select a Product Price Book.
- Click Sort to reorder how Products associated with the Opportunity display.

Products are generally added when the Opportunity is created. See the Create New Opportunities QRG for more information on adding Products.

## Open Activities

Open Activities displays any open Activities relating to the Opportunity.

- Click any Activity **Subject** to view further information.
- Click New Task to create new task for the Opportunity.
- Click New Event to create a new event for the Opportunity.

See the Activities QRG and the Events QRG for more information.

## Relationship Power Maps

Relationship Power Maps are defined as part of the Australia Post Sales Process.

The following steps outline how to add a Relationship Power Map to an Opportunity.

1. Click New Relationship Power Map

The **Relationship Power Map Edit** screen displays.

2. Complete required fields to add the Relationship Power Map.

Relationship Power Map Edit 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 | Definition |
|---|---|
| **Information** | |
| **Position** | Position in the Organisation to which the Opportunity is associated.<br>• Click in the field and type relevant information. |
| Decision Maker/Influencer | Denotes if the person being added has a position of responsibility or influence.<br>• Click the drop-down menu and select the relevant option. |
| Key Contact | The key contact at the associated Organisation are we dealing with. |
| AusPost Relationship | Denotes if the person being added is an advocate of Australia Post.<br>• Click the drop-down menu and select the relevant option. |
| Opportunity | Defaults to the name of the Opportunity. This is a read only field. |
| Engage Contact | Denotes if the person being added needs to be engaged.<br>• Click the checkbox. |
| Engagement Next Steps | Next Steps for engagement the Contact (if applicable).<br>• Click in the field and type any relevant information. |

3. Click Save

- To cancel out without saving, click Cancel

The Relationship Power Map section of the Opportunity is updated.

## Pain Chains

Pain Chains are defined as part of the Australia Post Sales Process.

The following steps outline how to add a Pain Chain to an Opportunity.

1. Click New Pain Chain

The **Pain Chain Edit** screen displays.

2. Complete required fields to add the Pain Chain.

Pain Chain Edit 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 | Definition |
|---|---|
| **Information** | |
| **Issue** | • Click in the field and type any relevant information. |
| Opportunity | The Name of the Opportunity. This is a read only field. |
| Individual | • Click and use Lookup to select the relevant Individual. |
| Internal Stakeholder Impact | Details of other internal stakeholder impacted by the issue.<br>• Click in the field and type any relevant information. |

3. Click Save

- To cancel out without saving, click Cancel
- To save and add a new Pain Chain, click Save & New

The Pain Chain section of the Opportunity is updated.

## Decision Criterion

Decision Criterion is defined as part of the Australia Post Sales Process.

The following steps outline how to add a Decision Criterion to an Opportunity.

1. Click New Decision Criterion

The **Decision Criterion Edit** screen displays.

2. Complete required fields to add the Decision Criterion.

Decision Criterion Edit 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 | Definition |
|---|---|
| **Information** | |
| **Criterion** | • Click in the field and type relevant information. |
| Opportunity | The Name of the Opportunity. This is a read only field. |
| Importance | Overall importance of Decision Criterion to the decision as a percentage.<br>• Click in the field and type the relevant percentage. |
| Competitive | Details of how competitive Australia Post are to this criterion.<br>• Click in the field and type any relevant information. |

3. Click Save

- To cancel out without saving, click Cancel
- To save and add a new Decision Criterion, click Save & New

The Decision Criterion section of the Opportunity is updated.

## Competitors and Incumbents

**Competitors** in Salesforce.com are Organisations that have a competitor role. An **Incumbent** is a competitor that we need to dislodge in order to provide product or services.

## Collateral

Unlike a simple attachment, Collateral can be submitted to a line manager for formal approval prior to distribution and has some descriptive fields associated with it to help others understand what it is in the context of an Opportunity.

The following steps outline how to add Collateral to an Opportunity.

1. Click New Collateral

The **New Collateral Edit** screen displays.

2. Complete required fields to add the Collateral.

New Collateral Edit 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 | Definition |
|---|---|
| **Information** | |
| **Collateral Name** | This is a reference to what the document is actually for.<br>• Click in the field and type any relevant information. |
| Approval Status | Describes the Approval Status of the collateral; this is a read only field. |
| **Opportunity** | Defaults to the name of the Opportunity. |
| Final | • Click the check-box. |
| Document Type | Type of the document being added as Collateral.<br>• Click the drop-down menu and select the relevant option. |
| Standard | • Click the check-box. |

3. Click Save

The **Collateral Detail** screen displays.

- To attach Collateral document itself, click Attach File
- To attach a note as Collateral, click New Note
- To submit the Collateral for approval, click Submit for Approval

4. Click the Opportunity **Name** to return to the Opportunity screen.

The Collateral section of the Opportunity is updated.

## Approval History

A non-editable record of the approval process a Collateral record has been through.

## Sales Team

A sales team are employees that will work together on the Opportunity. You can add sales team members, select their role and specify the level of access that each team member has to your opportunity.

The following steps outline how to add a Sales Team to an Opportunity.

- Click Add to add new Sales Team members.

The **Sales Team Members** screen displays.

1. Complete required fields to add the Sales Team members.

Sales Team Members 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 | Definition |
|---|---|
| **Information** | |
| User | Sales Team Member name.<br>• Click in the first **User** field and type the relevant Individual or Organisation.<br>Alternatively:<br>3. Click 🔍 and use lookup to locate the required user. |
| Opportunity Access | Level of access the Sales Team Member has to the Opportunity.<br>• Click the drop-down menu and select the relevant option. |

2. Click Save

- To cancel out without saving, click Cancel

The Sales Team section of the Opportunity is updated.

### Default Sales Team

If you have created a default Sales Team as part of your user profile, click Add Default Team to add them to the Opportunity.

## Activity History

The Activity History displays all completed tasks for the Opportunity.

3. Click Log A Call to record the outcome of an unplanned phone call as an Activity.
4. Click Send An Email to send an email and associate it with the Opportunity as an Activity.

See the Work with Activities QRG for more information.

## Notes and Attachments

Add Notes or attach documentation or marketing collateral to the Opportunity.

5. Click New Note to add a new note.
6. Click Attach File to attach a file.

See the Edit Individuals and Organisations QRG for more information.

**Stage History**

The Stage History displays the detail of changes to the Opportunity Status. Any the Opportunity Status change, a new entry is added containing the name of the person that made the change and a date stamp.

### Hover over the Hovers

The Hovers at the top of the Opportunity screen reproduce all of the sections, and the options, that display if you scroll down.

For a quick snapshot, use the Hovers.