# Table of Contents

CRM – Sales Opportunity Management ............................................................................. 4

Description ..................................................................................................................... 4

1.1 Process Elements ..................................................................................................... 5

- Register Opportunity ................................................................................................. 5
- Enable Reminder and Event ........................................................................................ 7
  - Review Date Set? ..................................................................................................... 7
- Wait for Review Date .................................................................................................. 7
- Notify Review Date ...................................................................................................... 8
  - Update Opportunity ................................................................................................. 9
  - Confirm Closure? ..................................................................................................... 11
  - Enable Task Scheduling ......................................................................................... 12
  - Schedule Tasks ....................................................................................................... 12
  - Opportunity Reassigned? ....................................................................................... 12
  - Notify Assignment .................................................................................................. 12

Schedule Tasks ............................................................................................................... 14

Description ..................................................................................................................... 14

Process Elements .......................................................................................................... 14
  - Enable Actions ........................................................................................................ 14
  - Reschedule Task ..................................................................................................... 15
  - Wait Reminder Date ............................................................................................... 15
- Send Reminder ........................................................................................................... 15
  - End Task ................................................................................................................ 16

Performers ....................................................................................................................... 17

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Opportunity management is a vital process in marketing and sales operations. It is up to you to provide the best service to companies that are interested in what you have to offer. It is all possible if you know your customer’s needs and your strengths against your competition.

A lot of information flows between potential customers and your marketing and sales team, and you are wasting it if you do not define an opportunity management process. Why not catch all that information and use it to define your market strategies?

In addition, you must be capable of timely respond to customer’s questions, needs and requests since the first moment they demonstrate interest in your products or services in order to successfully close deals.

This process requires assistance by information technology tools that allow you to have real time data that support your decisions.

Bizagi has developed this template to help you in the definition and automation of your own opportunity management methodology. You will be able to:

- Define your stages and scores to qualify opportunities.
- Access the necessary information to follow up every opportunity.
- Configure tasks and receive reminders via email when they need to be executed. This way you are always taking care of your customers and offering them faster responses to their requirements.
- Integrate your teams to manage opportunities and guarantee that the appropriate person is attending the customer at every stage you defined.
- Collect information to build useful reports about your sales performance

Improve your service levels and do not give your competitors the chance to reduce your profits.
CRM - Sales Opportunity Management

Description

The purpose of this process is to follow up and manage the necessary activities to convert leads into closed deals. When an opportunity has been detected, a marketing agent enters the related information in order to create the opportunity record in the system. From this moment, the marketing agent will be able to update the opportunity information along with the customer’s evaluation and purchase process. The template allows you to configure tasks (emails, phone calls, faxes) to ensure their execution.

The opportunities can flow between different members of the marketing and sales areas. The opportunity owner is able to re-assign it at any moment. This way, the customer follow up can be performed by the appropriate person at the different stages. Once the customer’s final answer is known, the opportunity can be closed as won or lost.
1.1 Process Elements

Register Opportunity

Description

In this activity, a marketing or sales agent enters the information related to a new business opportunity. A complete description of an opportunity includes:

- **Customer Information**: Necessary information about the Customer.

- **Partner Information**: Necessary information about the Partner. It only applies for companies that perform this business strategy.

- **Opportunity Contacts**: The people who the opportunity owner must establish communication with for topics related to the opportunity.

- **Topic**: Brief description of the opportunity

- **Description**: Detailed description of the opportunity

- **Lead source**: Means by which the opportunity was generated. This information is useful to obtain reports about the main origins of opportunities.

- **Estimate Closure date**: Date that the opportunity is expected to be closed. This date is the base to calculate the Forecast.

- **Reminder Date**: Date that the owner wishes to be reminded about the opportunity.

- **Stage**: This attribute represent the evolution of the opportunity. Each stage has an associated score.

- **Potential revenue**: The total amount of the business opportunity.

Documents can be attached in the document tabs to support information that has flowed between the opportunity owner and the customer, such as quotations, proposals etc.

Performers

Marketing Agent, Sales Agent
Forms

**Name:** New Opportunity

**Description:** This form is used to enter the information related to the new business opportunity

**Prototype:**

![Form Prototype](image)
Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Set Owner: To record the person logged in as the owner of the opportunity</td>
</tr>
<tr>
<td>On save</td>
<td>Add Contact: Relates the chosen customer contacts as contacts of the opportunity</td>
</tr>
<tr>
<td>On exit</td>
<td>Associate: Associates the current opportunity to the customer’s opportunities.</td>
</tr>
</tbody>
</table>

Enable Reminder and Event

Description

This gateway enables two parallel paths. The first path enables a timer to send a reminder about the opportunity to the opportunity owner. The second path enables the “Update opportunity” event, which is always available for the Owner to work on the opportunity.

Review Date Set?

Description

This gateway evaluates if the opportunity’s owner has set a review date.

- **Yes**: The process waits until the set review date is achieved to send a notification.
- **No**: The path is disabled.

Wait for Review Date

Description

This timer event is configured in the “Register opportunity” activity. It allows the owner to configure a date in which a notification reminder is sent to remind him/her of the new opportunity, in case there is no activity from it. When such date is achieved, this event enables the “Notify review date” task.
### Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Duration: This expression sets the timer duration. The review date entered in the Register Opportunity activity is defined as the estimated solution date of this event.</td>
</tr>
</tbody>
</table>

**Notify Review Date**

**Description**

An e-mail is sent to the opportunity owner to notify him/her that the established opportunity review date has been reached.

**Script**

Dear <BusinessOpportunity.Owner>

The following business opportunity needs to be reviewed:
Topic: <BusinessOpportunity.Topic>
Description: <BusinessOpportunity.Description>
Estimated Close Date: <BusinessOpportunity.EstCloseDate>

Click [here](#) to access the case.

Yours sincerely

CRM Administrator

**Actions**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Create Email: This rule generates the email that will be sent in this activity.</td>
</tr>
</tbody>
</table>
Update Opportunity

Description

This is the most important activity of the template. In it, the opportunity owner can update and manage his/her opportunity. The following actions can be performed:

- **Update the General Information:** The user can modify any information related to the opportunity as the estimated closure date according to its evolution, the potential revenue, result of negotiations, customer information, partner information etc.

- **Update Stage:** Because this attribute reflects the evolution of the opportunity, this is the main information that is updated in this event to refresh the forecast and general marketing and sales reports.

- **Create tasks:** The user can configure tasks as email sending and calls, etc. Each task needs a description of what has to be performed as well as a date and time to be executed. The owner can choose to be reminded of the task.

- **Create notes:** Notes about the opportunity can be entered in the activity form. These notes are open text so the owner can write anything on his/her mind that is relevant to the opportunity. Bizagi will save the date, time and author, in case the opportunity is reassigned, so there will be a historical track of what has happened.

- **Reassign the Opportunity:** The user can reassign the opportunity to another person if he/she considers it necessary by simply choosing a new person from the list.

  The re-assignation is mainly used to transfer the opportunity from the marketing area to the sales area when it has reached an advanced stage. If a new owner is assigned, an email will be sent informing of the re-assignation.

- **Close the opportunity:** From this event, the opportunity owner can close the case. According to its development and negotiations with the client, the opportunity can be closed as:

  - **Won:** It means the opportunity has concluded successfully. The real revenue must be entered.

  - **Lost:** It means the opportunity has not been conducted to a closed deal. The reasons of the loss must be entered, if the opportunity was lost against competition, the competitor can be entered or selected from those already created. This information is useful to create reports and evaluate the causes of failed opportunities.

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>The event is assigned to the opportunity owner</td>
</tr>
</tbody>
</table>
Forms

Name: Update Opportunity Form

Description: This form is used to update the information related to business opportunity

 Prototype:
**Name:** Close Opportunity tab  
**Description:** This form is used to close the business opportunity.  
**Prototype:**

![TextStyle](image)

### Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| On save    | Update Tasks: This expression identifies if the user changed the status of any configured task and reschedule or finish it according to the current status.  
Get Reports Dimensions: This expression obtains the month and year of the estimated close date to allow the user to build forecasting reports. |
| On exit    | Opportunity Re-assignation: This rule is used to identify if the opportunity was reassigned.  
Update Stage: This expression updates the stage of the opportunity according to the closure type (as won or lost). |

---

**Confirm Closure?**

**Description**

This gateway evaluates if the opportunity owner confirmed the case closure.

- **Yes:** The case is closed
- **No:** The “Update opportunity” activity is enabled again.
Enable Task Scheduling

Description
This gateway enables two parallel paths. The first path enables the “Update opportunity” event to the current owner. The second one enables the “Schedule task “multiple sub-process.

Schedule Tasks

Description
An opportunity can require the performance of multiple tasks to follow it up. This sub-process is enabled each time a task has been configured in the “Update Opportunity” event to remind the opportunity owner about the need to perform this activity on the chosen date and time.

Loop type
Multi-Instance

MI Ordering
Parallel

Flow Condition
All

Opportunity Reassigned?

Description
This gateway evaluates if the opportunity was reassigned.

• Yes: A notification is sent to the new opportunity owner.

• No: The “Update opportunity” activity is enabled again to the current owner.

Notify Assignment

Description
An email is sent to the new opportunity owner to notify him/her of the assignment.
Script

Dear <BusinessOpportunity.Owner>

The following business opportunity has been assigned to you:
Topic:<BusinessOpportunity.Topic>
Description:<BusinessOpportunity.Description>
Estimated Close Date:<BusinessOpportunity.EstCloseDate>

Click [here](#) to access the case.

Yours sincerely

CRM Administrator

<table>
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<tr>
<th>Type</th>
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</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>
Schedule Tasks

Description
An opportunity can require the performance of multiple tasks to follow it up. This sub-process is enabled each time a task has been configured in the “Update Opportunity” event to remind the opportunity owner about the need to perform this activity on the chosen date and time.

Process Elements

Enable Actions
This event based gateway enables three events. The first event is a timer that waits until the task due date is reached, to send a reminder. The second event is used to reschedule the task reminder if the opportunity owner changes its due date. The third path allows the opportunity owner to finish the task. Whichever path is executed first will cancel the others.
Reschedule Task

Description
This event is enabled to allow re-assigning a date on which the task reminder is sent.

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>The event is assigned to the bizagi’s administrator</td>
</tr>
</tbody>
</table>

Wait Reminder Date

Description
This timer event waits until the task due date is achieved to send a reminder to the opportunity owner about the execution of this task.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Duration: This expression sets the timer duration. The due date entered in the task configuration form is defined as the estimated solution date of this event.</td>
</tr>
</tbody>
</table>

Send Reminder

Description
An email is sent to the opportunity owner to remind him/her about the execution of the configured task.

Script

Dear <BusinessOpportunity.Owner>
The following task must be performed:
Type of task:<BusinessOpportunity.Task.Type>
Subject:<BusinessOpportunity.Task.Subject>
Description:<BusinessOpportunity.Task.Description>
Due: <BusinessOpportunity.Task.Due>

Click here to access the case.

Yours sincerely

CRM Administrator

End Task

Description

This event is enabled to allow the user to finish the task at any time.

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>The event is assigned to the bizagi’s administrator</td>
</tr>
</tbody>
</table>
Performers

**Marketing Agent (Role)**
Person who identifies and qualifies business opportunities.

**Sales Agent (Role)**
Person who negotiates and concludes business opportunities.