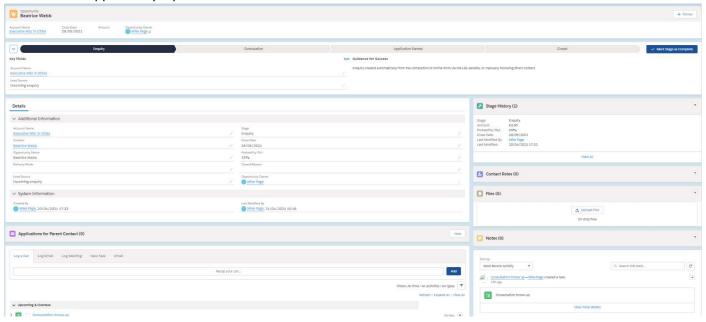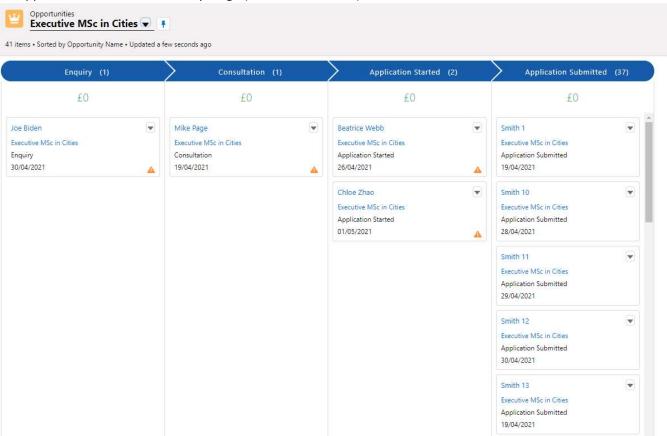## Opportunity Pipelines Core Service

What is an Opportunity pipeline?

An Opportunity is the potential to realise a particular outcome, commonly the opportunity to make a 'sale'. In HE terms, this may be the opportunity to convert a prospective applicant to a registered student, to convert a prospective donor to making a gift, etc. The pipeline is the set of linear stages that the opportunity typically goes through to reach that outcome, commonly to a positive 'closed won' or a negative 'closed lost'.
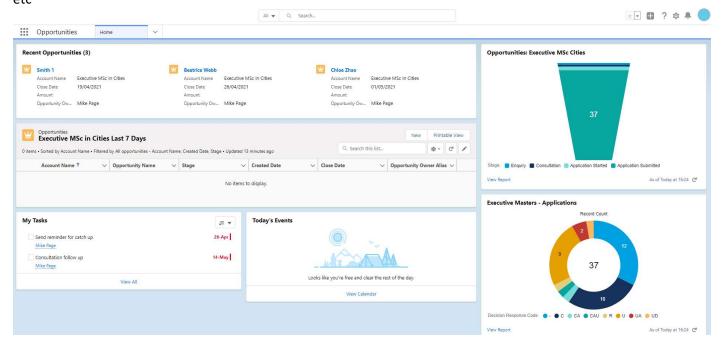
An individual Opportunity Pipeline looks like this:

All Opportunities can be viewed by stage (in a Kanban Board):

Other data can be combined, along with reports and charts, to track where you are at with your opportunities, tasks, etc

Accounts

An Account can be used in different ways. LSE has Accounts for Organisations, Schools, HEIs, and also Academic Departments and Programmes. Account structures can have hierarchies (so that an organisation or programme can be parented by another account).

In terms of Opportunities, there are two main uses of Accounts:

> 1) An Account that all the Opportunities are associated with, typically where the Opportunity is in relation to a person and not an organisation, and so all opportunities can be grouped by the Account. An example, being Accounts for Executive Short Courses to enable opportunities to be reported on across multiple courses within the Account structure.

> 2) An Account that represents the organisation associated with the Opportunity. An example being a custom programme that is an Opportunity with a particular organisation.

Activities

These are things that can be tracked against the Opportunity. Options include: Log a Call, Log an Event (meeting), Create a Task, Log an Email, or Send an Email.

Emails

There are a few methods for tracking emails.

1) Record manually that you sent an email with whatever summary and date;

2) Link your Outlook email account and send an email from Salesforce to send from your Outlook account. Any reply will go to your Outlook inbox, and not Salesforce;

There is also the option of manually logging emails received in outlook into the Opportunity (via an Outlook add-on)

3) Use the Service desk functionality to send an email (creating a Case record of that send). Any reply will thread to the same Case record to retain the email trail within the system.

Contact Roles

Contact roles enable you to record a person (contact) and the role they have in relation to the Opportunity (e.g. Budget Holder, Purchasing Officer, etc).

Notes

The ability to record notes against the Opportunity.

Files

You can attach files / documents to the Opportunity.

Follow

The ability to 'Follow' an Opportunity so that you receive notifications when there is a change on the Opportunity record.