Opportunity Fields in Exadel Salesforce

What is an Exadel opportunity? It is an increment of potential revenue that can or could be billable to a specific customer from Exadel or an Exadel subsidiary as part of an agreement obligating the specific customer to pay for some service from us.

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Fields in the Form Layout

The standard form for editing and viewing opportunities is divided into sections that group related fields together.

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Opportunity with Life-Cycle-Related Info

[Left Column]

Account Name

Select from prompt of existing accounts or create a new one:

This describes the "bill-to" for the opportunity if closed won—who will pay the bill, whose name is on the SOW. If it's important to mention the actual company who the work is ultimately for, add this info in the opportunity name.

> The account name can be changed by deleting the existing one.

Opportunity Name

Type:

A unique identifying "title" for the opportunity. Don't include the account name. The name should be meaningful, but brief. Well-written opportunity names make reviews more efficient.

Opportunity Owner

Click on Change Owner symbol and select from dialog box that searches for active users:

This is the main "spokesperson" for the opportunity (for instance, reporting on it when asked in a pipeline meeting). Even if many different people work on closing the deal, this is the primary salesperson on this opportunity. The overall account manager could be a different person. The opportunity owner can also be someone temporarily working the opportunity until a later stage.

Business Unit

Calculated

This groups together opportunities from different sales/account management teams. Calculated from the account's default business unit designation unless overridden by an override field in the Overrides section. If all or most of this account's opportunities should be a different business unit, set it at the account level instead of overriding each opportunity.

Opportunity Type

Selected from a list:

- NN – New Client
- EN – Existing Client, New Opportunity
- EE – Existing Client, Expanded Scope
- RR – Run Rate

Rule of thumb: "Revived" old clients can be treated as new clients if there has been no activity for 3 years on the account by us.

For a new client, once the first opportunity closes as won, all the other open opportunities should be designated as EN.

EEs are for additional duration or resources for an existing project. For instance, a project SOW says the client can add extra resources via an email. If this were a possibility in a particular case, it would be an EE.

RRs are renewals and extensions that are expected, typically on a periodic basis.

Cross-selling with

Selected from a list of business units:

- Codete
- Consulting
- Digital Experience
- Engineering
- Financial Services
- Motion

If an opportunity involves cross-selling with another business unit, record that here. This is used for reporting.

> To reach out to another business unit, if you have no other contact info, start with emailing the unit head:
>
> - Codete: Artur Olechowski
> - Consulting: Rebecca Watson
> - Digital Experience: Lev Shur
> - Engineering: Travis Larsen
> - Financial Services: Matt Midson
> - Motion: Christo Peev

Responding to an RFP or RFI?

Checkbox

Cloud service involved?

Selected from a list:

- None
- AWS
- Azure
- Google
- IBM
- Oracle
- Hybrid

This signals to our VP of Cloud Services that there is an opportunity involving cloud services.

[Right Column]

Next Step (Opp)

Type:

This is the very next action in the future on the path to closing the deal. It should be a single thing. It should not be in the past. Include relevant dates as much as possible in the text. (The date of change itself is recorded by an automation.) This field is meant to be displayed in reports on a single line for quick review.

Notes (Sales Process)

Type:

This field tracks progress on the process of closing the deal. It's also a place where previous next steps can be stashed instead of cluttering up the Next Step field. It is not a description of the project or whatever is being won in the deal.

Pipeline Category

Selected from a list:

- Pipeline-Roadmap [non-RR opp forecast to book in the quarter of the entered close date]
- Pipeline-Upside [non-RR opp possibly booked in the quarter of the entered close date]
- Expected [RR opp expected to book in the quarter of the entered close date]
- Committed [work on opp has started or can start]
- Completed [work done]

Generally sales people should just accept the default value, Pipeline-Roadmap, for this. Sales operations will make changes to Committed or Completed as needed

RAG Status

Selected from a list:

- Green
- Yellow
- Red

This is a way of specifying the likelihood of closing the deal by the close date. Another formula field in Salesforce uses this value to generate an appropriately colored square to use in reports. Use this as a guide in selecting a value for this:

Green	We have the key customer stakeholders (technical, procurement, business) aligned, and you are planning to get the SOW signed by the Close Date in Salesforce (80%+ odds to close), The projected revenue will be weighted at 80%
Yellow	We have some of the key stakeholders aligned, there is still more work required, but have a path forward and runway to get the SOW signed by the Close Date (55%+ odds to close). The projected revenue will be weighted at 55%
Red	We need significant additional work with the key stakeholders, need to solve key issues, but if we are successful the SOW can be signed by the Close Date (10%+ odds to close), The projected revenue will be weighted at 10%
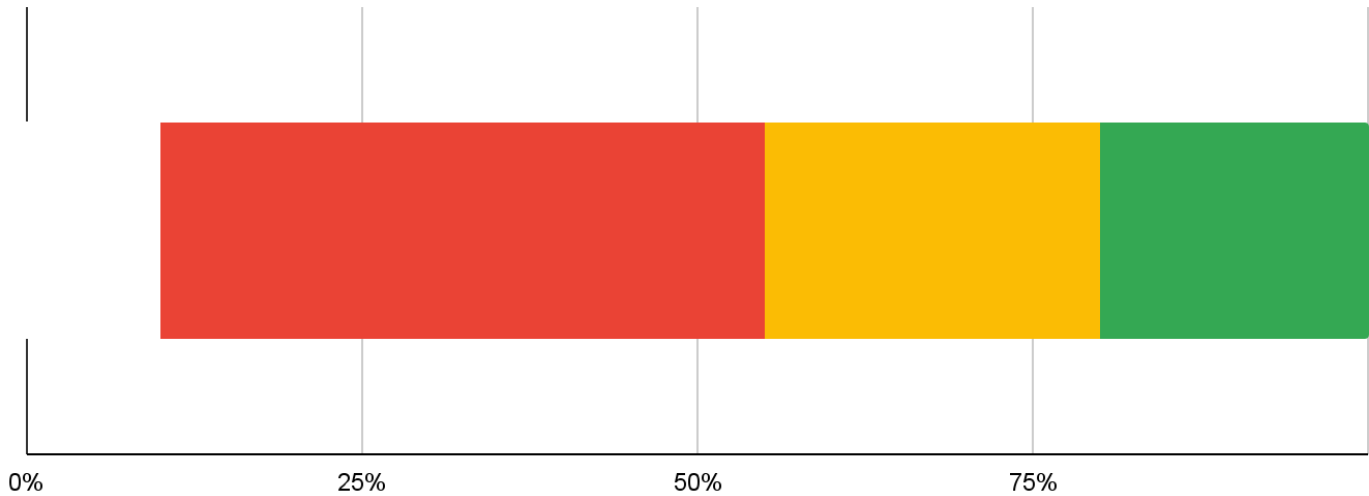
Stage

Selected from a list:

- 1_Opportunity Identified
- 2_Opportunity Qualified
- 3_Solution Approved
- 4_Proposal Submitted
- 5_Shortlisted/Negotiation
- 6_Verbal
- 7_Won
- 0_Lost
- 0_New Prospective Client
- 0_Placeholder

We use standard and non-standard stages. We use the standard stages to describe an opportunity's place in the mechanical process of getting to closing, not as the probability of closing. (RAG status is used for this.) We use the two non-standard stages, 0_New Prospective Client and 0_Placeholder, to track some things that are not really opportunities, but could lead to opportunities.

Open Stages for Opportunities

These stages are numbered showing the standard sequence of stages; although, not all stages need to be used for an opportunity.

1_Opportunity Identified	A new specific opportunity has been identified, but not ready to be considered sales-qualified
2_Opportunity Qualified	There is a confirmed business need, sponsor, and budget for this opportunity
3_Solution Approved	Internal (Exadel) approval has been obtained in a case where special formal internal (Exadel) approval is required for the solution developed, pricing, resources, or deliverables
4_Proposal Submitted	Once proposals or resumes have been submitted to the client even if initially rejected

	(Starts being counted even more in financial forecasting as part of the pipeline at this point.)
5_Shortlisted/Negotiation	• Selected for further consideration with other candidate firms or • Finalizing contract terms
6_Verbal	Verbal confirmation that we have won the opportunity

Closed Stages for Opportunities

7_Won	EITHER all required "paperwork" is completed and work can begin if not already authorized for early execution OR, at stage 6, satisfying the following conditions: existing client, work has started already, and requested by salesperson. Since these require an approval code, in practice only admins can set this stage. All requests to close deals as won should be sent to salesdesk@exadel.com with any SOWs, etc. attached to the email.
0_Lost	Opportunity closed because the deal was lost or for some administrative purpose (duplicate, etc.)

Stages for "Pre"-Opportunities

If successful, these types of engagements will spawn new (separate) opportunities proceeding through the standard sequence of stages. If there is nothing happening with a particular engagement, just close it as 0_Lost with Administrative Cleanup as the reason.

0_New Prospective Client	Actively engaging with a new prospective client or new part of an existing client , but no specific opportunity identified yet (no need to specify revenue, name, etc.)
0_Placeholder	A catch-all for various other prospective or active non-opportunities including: • Partnership deals • Campaigns (like private equity firm referrals to their portfolio companies) • A class (by technology, project type, etc.) of potential opportunities with a client

Comment on Win

Type:

This is an optional brief comment field in which you can share anything noteworthy about winning this particular deal, particularly if it's with a new client.

Lost Reason

Selected from a list:

- Not Tech Aligned
- Client Not Prepared
- Competition
- No Response
- Budget/Cost
- Lead Time
- Resources – Can't Fill
- Administrative Cleanup
- Other

If O_Lost is set as the stage, a reason needs to be selected. Since we never delete opportunities, Administrative Cleanup is available for things like duplicates.

Lost Description

Type:

Filling in a brief description here is required when the Lost Reason is Administrative Cleanup or Other, but it is also encouraged if there is any further information to add for the other reasons.

Opportunity ID

Calculated

The ID for the opportunity as a convenience for users. (It's actually in the URL.) One use for this is for the creation of a Jira ticket in the "Sales Support" project.

Dates and Revenue

[Left Column]

Close Date

Enter date:

This is either the date the deal is expected to close (including all paperwork) or the date it actually closed, whether won or lost. Opportunity owners should ensure that the expected close date is updated for open opportunities. (Edits can't be saved if the close date is before today's date.) An automation sets today's date to be the close date when an opportunity is closed.

Send SOW to Client

Enter date:

This is either projected or actual.

Send Proposal to Client

Enter date:

This is either projected or actual.

Project Start Date

Enter date:

This is either projected or actual for the **start** of the engagement..

Projected End Date

Enter date:

This is either projected or actual for the **end** of the engagement..

Proposal/SOW Review

Enter date:

This is either projected or actual in those cases where an internal review is needed before submitting to the client.

Estimate Due Date

Enter date:

This is either projected or actual where applicable

[Right Column]

2023 Forecasted Revenue

Type:

Projected revenue in 2023 if the deal closes successfully in US dollars. Do not discount this number for your guess of the probability of closing. The RAG status is used later by Finance to weight projected revenue.

2024 Forecasted Revenue

Type:

Projected revenue in 2024 if the deal closes successfully in US dollars. Do not discount this number for your guess of the probability of closing.

Total Forecasted Revenue

Calculated

Sum of projected annual revenues

Total Weighted $

Calculated

Sum of projected annual revenues weighted by RAG Status (probability).

Subsidiary for Opportunity

Calculated

This describes the "bill-from" for the opportunity—which subsidiary of Exadel will receive payment. It's set as the account's Primary Subsidiary designation unless overridden by an override field in the Overrides section. If all or most of this account's opportunities should be a different subsidiary than what is being shown, set it at the account level instead of overriding each opportunity.

Currency

Selected from list:

- EUR
- PLN
- GBP
- RUB
- USD
- BRL
- CAD
- CLP
- MXN
- BGN
- CHF

Although we want only US dollars in Salesforce, we still need to know the actual currency for the deal. The currency abbreviations are from [ISO 4217](). If this field is left blank, we assume USD as the currency.

Forecast by Month

For all salespeople, this section must be filled out in order to close an opportunity as won. Particular business units might require their salespeople to fill this out at earlier stages.

[Left Column]

Monthly if spread out evenly

Calculated

This would be the monthly revenue if calculated without adjustment based on total $, start month, and end month.

Currently entered monthly revenue summed

Calculated

Sums up all the monthly revenues entered in this section to check against the total revenue number appearing further up..

Year 1

Select from list:

- 2022
- 2023
- 2024
- 2025

What is the first year of revenues projected for this opportunity?

January (Y1) … Dec. (Y1)

Type:

Projected revenue for the particular month in US dollars

[Right Column]

Year 2

Select from list:
- 2022
- 2023
- 2024
- 2025

What is the second year, if any, of revenues projected for this opportunity?

January (Y2) ... Dec. (Y2)

Type:

Projected revenue for the particular month in US dollars

Background

[Left Column]

Description

Type:

Just at most a paragraph describing the project or engagement. The Notes field is for describing the process of closing the deal. Remember you can attach files to the opportunity to provide more information.

Focus

Checkbox:

Available to use for reporting or list views when narrowing to more important deals is required.

Externally Generated Description

Copied on lead conversion

There are two ways this field is filled in for opportunities that come from converted leads. For those that came from the website contact form, this will contain the text originally entered under "Comments". For those that came from an email to info@exadel.com, this should contain a cut-and-paste of the email itself.

Marketing Comments

Copied on lead conversion

For opportunities that come from converted leads, these are notes entered into the original lead—typically by a marketing person.

Converted

Calculated

For opportunities that come from converted leads, this checkbox will be checked.

[Right Column]

Lead Source

Copied on lead conversion or selected from this list:
- Existing Client (CFL)
- Sales Prospecting
- Partner
- Referral
- Referral (VC Portfolio) [referrals by a VC into their portfolio companies]
- Returning contact
- Public RFP
- ABM
- HubSpot
- Appery.io Contact Form
- E-mail Marketing
- Events
- Mobile Web
- Other
- Phone Inquiry
- Spam
- Web
- AzureMarketplace-CSC|Sovereign Nations Trusted Foundation

Returning contact - the contact we had experience with in the previous company and now it comes with new projects working in another company.

For sales people, these are the sources likely to be selected as part of creating an opportunity directly:
- Existing Client (CFL)
- Sales Prospecting
- Partner
- Referral
- Referral (VC Portfolio) [referrals by a VC into their portfolio companies]
- Public RFP

The others will generally be from converted leads. "HubSpot" is for leads that are pushed to Salesforce when the contact is sales-qualified in Hubspot. Leads from the website contact form will be either "Web" or "Mobile Web".

Lead Source Description

Copied on lead conversion or typed in as opportunity

Filling in a description here is required when the source is Other, but is encouraged for the other sources too, if there is any further information to add.

Last Page

Copied on lead conversion

For converted leads originating from the website contact form, the page visited before the contact form

N?

Calculated

Checkbox on for new opportunity created in the last 7 days

Delivery Details

## [Left Column]

Location 1

Selected from this list:

- ST_Brazil
- ST_Bulgaria
- ST_Canada
- ST_Colombia
- ST_Poland
- ST_US
- CL_Chile
- CL_Hungary
- CL_Lithuania
- CL_Mexico
- CL_Romania
- CL_Turkey
- UK_Ukraine
- Other

Delivery country #1 to target for staffing. In priority order: "ST_" Strategic Growth countries (Active Recruiting), "CL_" Specific Client Demand countries (Client-based Recruiting), "UK_" For existing customers that request it.

Global Target Countries for Delivery
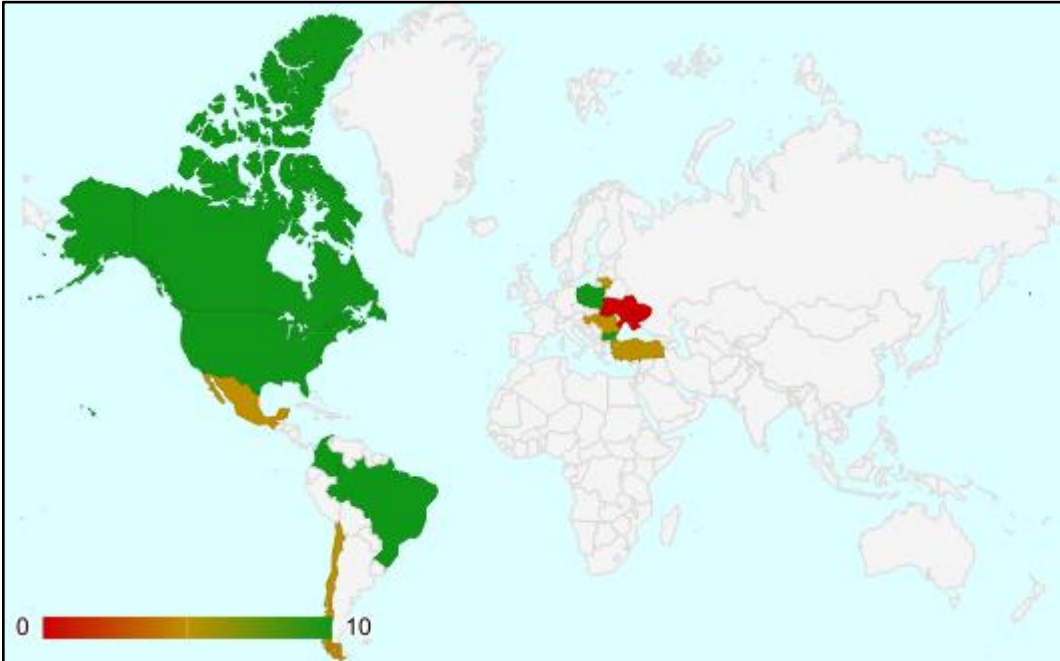
Just Europe
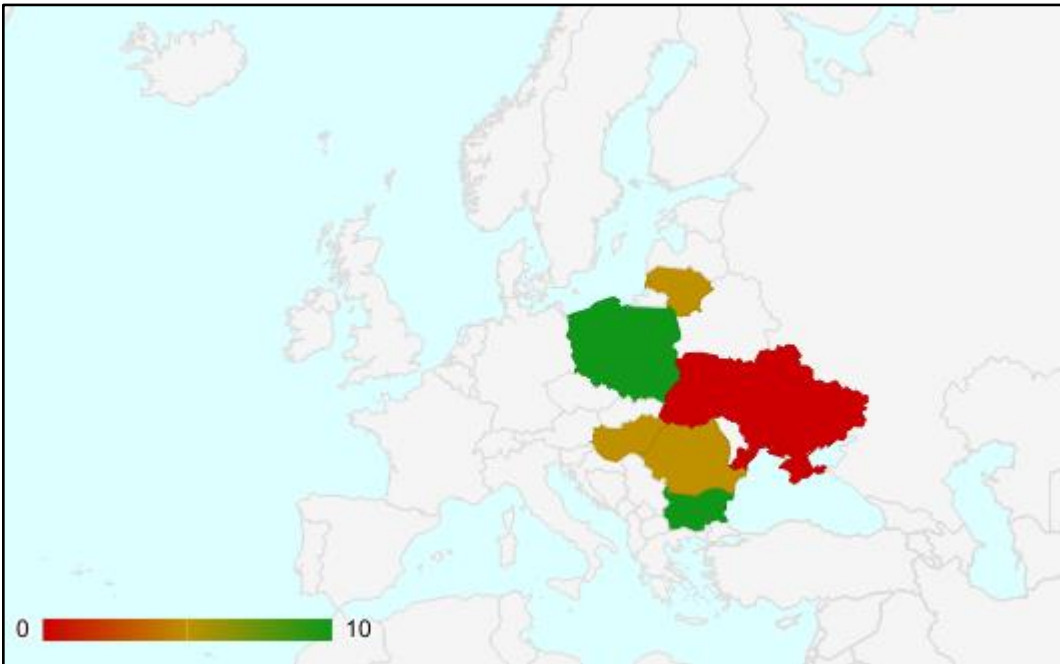
Resources 1

Type:

The number of resources required from delivery target country #1

Resource Notes 1

Type:

The type of resources required from delivery target country #1

Location 2

Selected from same list as Location 1
Delivery country #2 to target for staffing.

Resources 2

Type:
The number of resources required from delivery target country #2

Resource Notes 2

Type:
The type of resources required from delivery target country #2

If Other Selected

Type:
Country

Cost Estimate

Setting any opportunity to the 2_Opportunity Qualified stage should trigger the creation of a ticket in Jira alerting Client Solutions/Sales Support and filling in the two fields below.

[Left Column]

Link to Estimate Ticket

This will take you to the Jira ticket created by this automation
Filled in by script

[Right Column]

Link to Estimate Folder

This will take you to an automatically created Google drive folder for any Client Solutions work on this opportunity
Filled in by script

Even without this triggering event, you can always just contact Client Solutions at this email address:

Approval Codes

[Left Column]

Approval Code

Typed in by admin:

This is a code to connect the opportunity to a project in rVision and to a contract. An opportunity cannot be moved to 7-Won without this code, and the code can only be entered by an admin. It will be set after an email is sent to salesdesk@exadel.com with an SOW or other evidence of agreement requesting the closing.

SOW still required?

Checkbox marked by admin:

If the opportunity is with an existing client, work has already begun, and the salesperson affirms through an email to salesdesk@exadel.com that the final paperwork will definitely be finalized, sales operations can still provide an approval code and move the opportunity to 7-Won after checking this box as a reminder that the SOW or similar document still needs to obtained in its fully executed form.

[Right Column]

Approval Notes

Typed in by admin:

Optional information related to the issuance of the approval code.

Overrides

[Left Column]

Business Unit Override

Selected from a list of business units:

- Codete

- Consulting
- Digital Experience
- Engineering
- Financial Services
- Motion

If the default business unit isn't the correct business unit for this opportunity, set it here.

Subsidiary Override

Selected from a list of subsidiaries:

- Exadel US
- Coppei US
- CPQi Brazil
- CPQi Canada Limited
- CPQi Chile
- CPQi Mexico
- CPQi US
- Motion Software Bulgaria
- Motion Software Romania
- Exadel Belarus
- Exadel Colombia
- Exadel Georgia
- Exadel Germany
- Exadel Kharkiv
- Exadel Lithuania
- Exadel Poland
- Exadel Russia
- Exadel Switzerland
- Exadel Uzbekistan
- Exadel Vinnytsia
- Codete

If the default subsidiary isn't the correct subsidiary for this opportunity, set it here.

[Right Column]

Don't Show in Pipeline Report

Checkbox marked by admin:

Exclude from reports even if other conditions met

Miscellaneous

[Left Column]

Codete Deal ID

Read-only

Hubspot ID for Codete deal imported as opportunity

[Right Column]

Forecasted Revenue 2019-2022

Read-only

Old revenue numbers for admin reference on old opportunities

Required Fields at Different Stages

At any stage

- Account Name
- Opportunity Name
- Opportunity Type
- Pipeline Category
- Stage
- Close Date
- Lead Source

2_Opportunity Qualified as stage or higher

- 2023 Forecasted Revenue or 2024 Forecasted Revenue
- RAG Status
- Next Step (Opp)
- Cloud service involved?

4_Proposal Submitted as stage or higher

- Project Start Date
- Projected End Date
- Location 1 [Delivery]
- Resources 1 [Delivery]
- Resource Notes 1 [Delivery]

7_Won as stage

- Approval Code
- Year 1 [Monthly Revenue]
- January (Y1) … Dec. (Y1) [Monthly Revenue]