



Opportunity Edit
New Opportunity

Opportunity Edit

Sales - 1

= Required Information Lead Information

Opportunity Owner **603** Kenton Williams

Opportunity Name **200** Opportunity name must have the same name as the Account Name. (Ex. Account Name: Acme Printing Co = Opportunity Name: Acme Printing Co.)

Account Name **48** Account (only) look up

Referred by **??** Contact (only) look up

No. of Employees **49** Total Revenue

Amount **136**

Units Sold **??** **1(default)** Units Sold cannot exceed 1. If your opportunity is a "split" with another Sales Consultant, please enter 0.5.

Sales - 2

Stage **131** --None--
A - First Interview
B - Case Opened (RFP)
C - Proposal Delivered
D - Contract Delivered
E - Closed/Won
F - Hold
G - Lost
H - Dead

Probability (%) **132** **0, A=5%, B=15%, C=25%, D=70%, E=100%**

Probability by Consultant (%) **137**

Forecast Category **133** Lost/On Hold
Gathering Data
Proposed
Commit

Reason Lost **134** --None--
Benefits, Competition, Price, Status Quo, Timing, Other

Reason Lost Other **135** Complete this when Reasons Lost = Other

First Interview Date **138** [3/9/2011]

Case Open (RFP) Date **139** [3/9/2011]

Proposal Delivered Date **141** [3/9/2011]

Contract Delivered Date **142** [3/9/2011]

Contract Date **143** [3/9/2011] Estimated date you think the Contract will be signed

Est. Start Date **144** [3/9/2011] Estimated date when services will start

Sales - 3 Product Interest

Areas of Interest **03** Available: HRO, ASO, PEO, HR Consulting, HR Audits, HRC Basic, HRC Deluxe, HRC Premium, Agency, LMS Chosen

Sales - 3.5

Lead Source **61** Identify where this lead/account was referred from
Alliance (non paid), Alliance (paid), Bryce Johnson, Buyer Zone, Channel Partner, Client Referral, Cold Call, Hoovers, Lead List, LFA - PEO Connect, LFD - PEO Connect, Live Demo, Marketing, Networking Organization, ODY (Client Services), PEO Connect, Public Relations, Search Engine, Referral, Telemarketing, TexCap-Concord, TMAIT - PEO Connect, Trade Show, VHR (sales), Web, Web - Ballpark Event, Web - BLOC Party, Web - Contact Us Form, Web - On Demand, Web - Owners Night, Other

Company Source Campaign **29** Campaign look up
This is mapped from the converted Lead record

Sales - 4

Comments

Admin

Admin (RPF) Stage **211** **Not Started** (default) In Progress
Completed
Waiting on someone else
Deferred
Escalated

Waiting on (Who) **212** Admin
David Williams
Carl Kleimann
Clyde Green
Sales Consultant
Dave Rettig
Agency

(RFP) Priority **213** **High** **Medium (default)** Low

Case Promised (RFP) Date **140** **193 Validation Rule** [3/9/2011] Date Admin. promised RFP completed and back to the Sales Consultant

?? 214 [3/9/2011] Get Text

?? 215 [3/9/2011] Get Text

?? 216 [3/9/2011] Get Text

?? 217 [3/9/2011] Get Text

?? 218 [3/9/2011] Get Text

?? 219 [3/9/2011] Get Text

?? 220 [3/9/2011] Get Text

Proposal

Proposal Submission Date **??** [3/9/2011]

Proposed Contact's Full Name **??**

Proposed Contact's Title **??**

Prospect's Current Workers' Comp Provider **??**

Proposal Rate Quote Expiration Date **??** [3/9/2011]

Side by Side Comparison Effective Date **??** [3/9/2011]

Proposed Benefits **??** Available: Group Medical, Dental, Vision, Long Term Disability (LTD), Short Term Disability (STD), Cafeteria Plan Chosen

List of Documents Added In Appendix **??** Available: HRO, PEO, ASO, HRC, Black Book of Outsourcing, Why Odyssey, About Odyssey, 401(k) Packet, Saas HR, HR Advisor Chosen

Executive Summary

Executive Summary ??	Employee Benefit Concerns ??
Payroll Concerns ??	Employee Benefit Impact ??
Payroll Impact ??	Employee Benefit Solution ??
Payroll Solution ??	(Optional) Concerns Title ??
Human Resources Concerns ??	(Optional) Concerns ??
Human Resources Impact ??	(Optional) Impact ??
Human Resources Solution ??	(Optional) Solution ??
Safety & Risk Concerns ??	
Safety & Risk Impact ??	
Safety & Risk Solution ??	

Marketing - 4

LinkedIn Address **21**

Facebook Address **13**

Twitter Username **32**

YouTube **36**

Web Form Comments **33** **Read Only Text Field** Please do not manually edit these comments. These are made by the contact using a web form on our website

KEY:

Help for this Page = Does "Not Map" A/C or O = Mirrored from the Account level = (RFP) = Client Manager = HOOVERS