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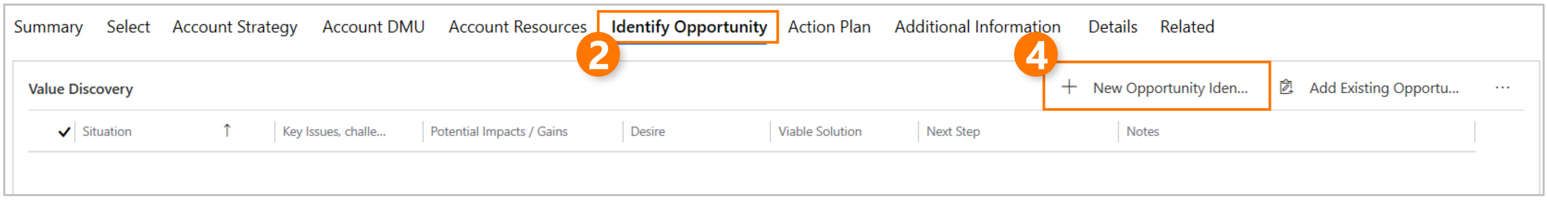
IDENTIFY OPPORTUNITY and VALUE DISCOVERY

Business Rule:
To create a new **Sales Project**, the user must first create a **Value Discovery**. The user must create a **Value Discovery** within the **IDENTIFY OPPORTUNITY** tab within the associated account. After creating the **Value Discovery**, the user can create a new **Sales Project** directly in the **IDENTIFY OPPORTUNITY** tab to carry over the account data. For more information on creating a new **Value Discovery** and **Sales Project**, refer to the instructions below.

Navigating to IDENTIFY OPPORTUNITY Tab

1. On the navigation menu, click **Accounts** to open the **Active Accounts** page.
2. Search for the desired account and click on the account hyperlink to open the **Account Summary** page. Click on the **IDENTIFY OPPORTUNITY** tab.
3. To add a new value discovery, click **+ New Opportunity Identification.** The system may prompt the user to save any unsaved changes, and if so, the user should click **Save and Continue.** The **New Opportunity Identification** page will open.



Creating Value Discovery in the IDENTIFY OPPORTUNITY Tab

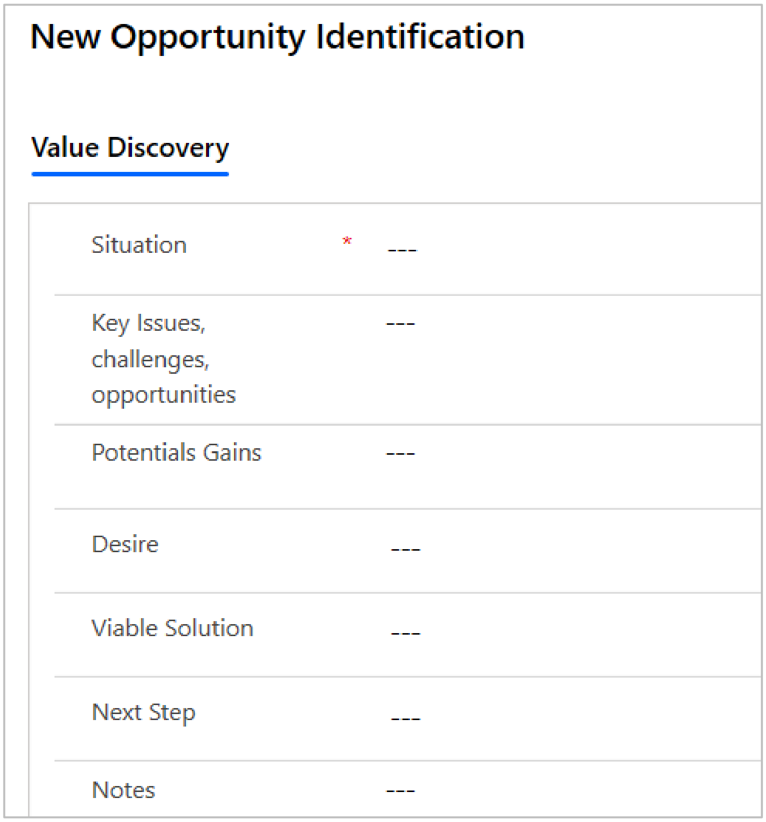
1. Enter the **<Situation>**.
2. Enter the customer's **<Key Issues, challenges, opportunities>**.
3. Enter the customer's **<Potential Gains>**.
4. Select if there is **Desire** to commit by the customer.
5. Select whether <Company name> can offer a **Viable Solution**.

   Note:
   If the user selects **Yes** in the **Desire** and **Viable Solution** fields, then the system will automatically populate the **Next Step** field with **Sales Project.**

6. Select the **<Next Step>**.

   Business Rule:
   The system will only generate a Sales Project if the **Next Step** field is **Sales Project**, whether that is through manual selection, or the automatic system functionality mentioned above.

7. Enter any relevant **<Notes>** to the sales project.
8. Click **Save** to generate a **Sales Project**. The **New Sales Project** page will open.



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SALES PROJECT

Creating Sales Project – Project Information

1. Enter the **<Project Name>**.

   Quick Tip:
   For additional information on the data standards regarding the naming of *new* sales projects, please refer to the QRG #1 – Data Standards and Navigation

2. Confirm the **Account**.
3. Select the **Sales Project Type**.

   Note:
   An **Offensive Strategy** is when <Company Name>is proactively pursuing a customer. A **Defensive Strategy** is when <Company Name>is acting to preserve a current customer.

4. Select whether there is a **Cross Selling Opportunity**.
5. Select whether the sales project is **Budgeted**.
6. Select whether there is a **CSR Impact**.

   Note:
   The **Corporate Social Responsibility (CSR) Impact** field is to capture whether the sales project will have an environmentally-impactful product or process.

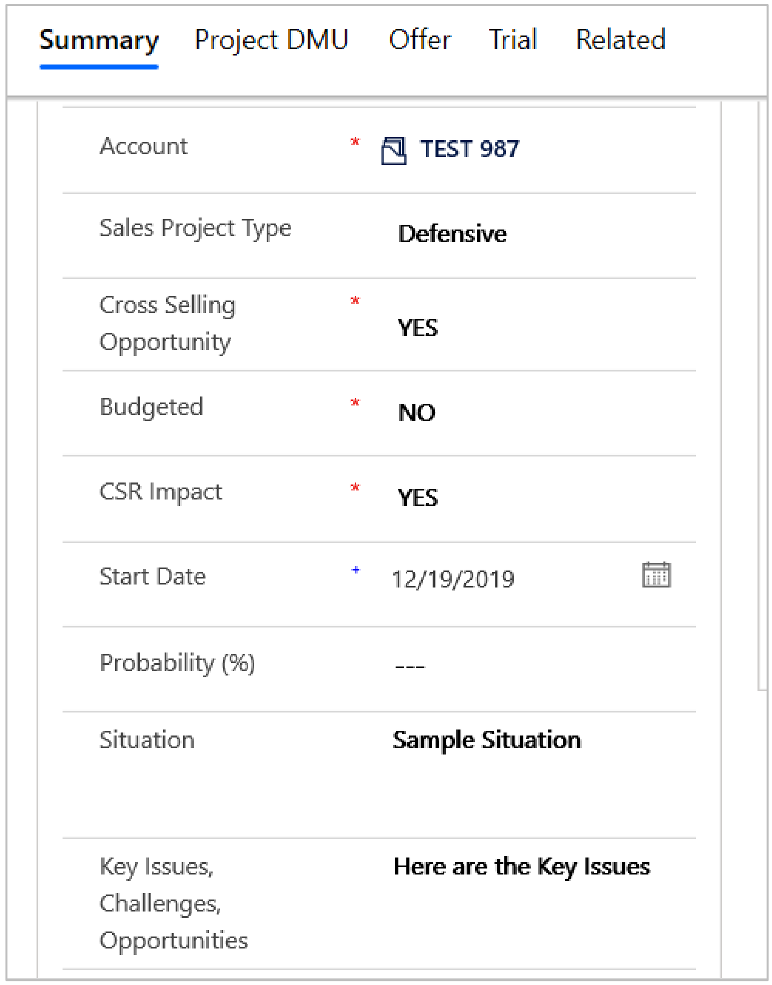
7. Select the **Start Date**.
8. Enter the **<Probability (%)>** of winning the sales project.

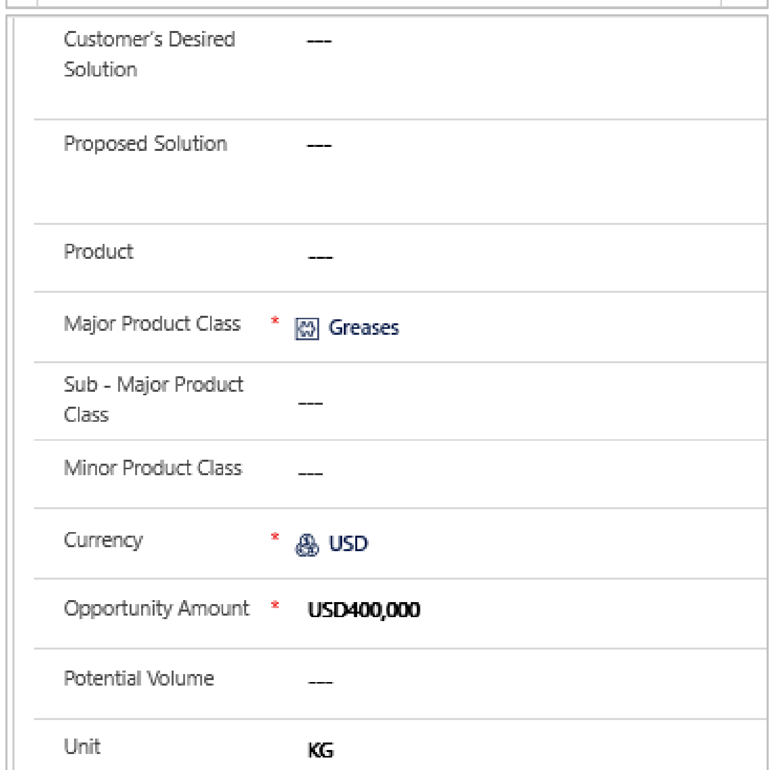
   Note:
   The **<Situation>** and **<Key Issues, Challenges, Opportunities>** fields will be populated once the required fields have been completed and saved.

8. Enter the **<Customer's Desired Solution>**. [note about being required for develop]
9. Enter the **<Proposed Solution>**.
10. Enter the name of the proposed **<Product>**.

    Note:
    The **<Product>** entered in this field will be populated in any newly generated offers.

11. Select the **Major Product Class**.
12. Select the **Sub-Major Class**.
13. Select the **Minor Product Class**.
14. Confirm the **Currency**.
15. Enter **<Opportunity Amount>**.
16. Enter the **<Potential Volume>**.
17. Locate the **Est. Close Date** field in the top-right corner of the page and select the date.
18. Click **Save** to allow the system to populate the other sections of the Sales Project.





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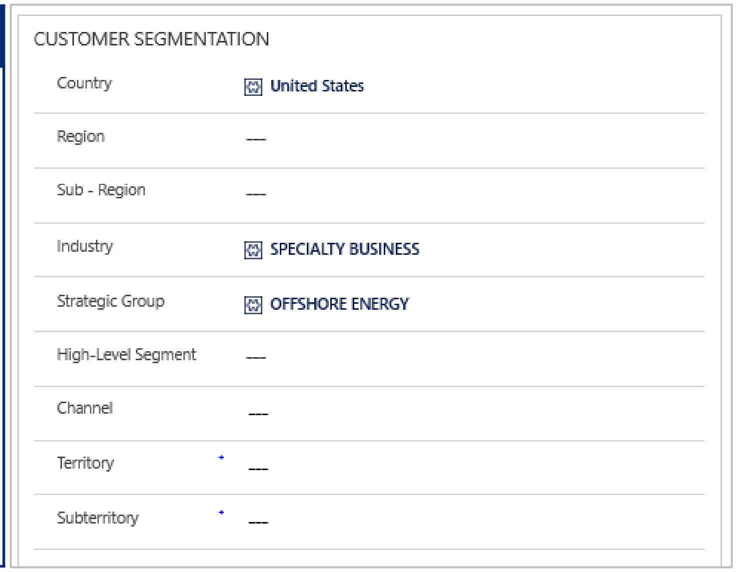
SALES PROJECT

Once the Sales Project's required fields have been completed and saved, the system will populate the **Customer Segmentation** section, **Identify Team** section, and **PROJECT DMU** tab with data previously populated by the user during the creation of the Account. The user should confirm the data populated in these areas and input any additional details, if desired.

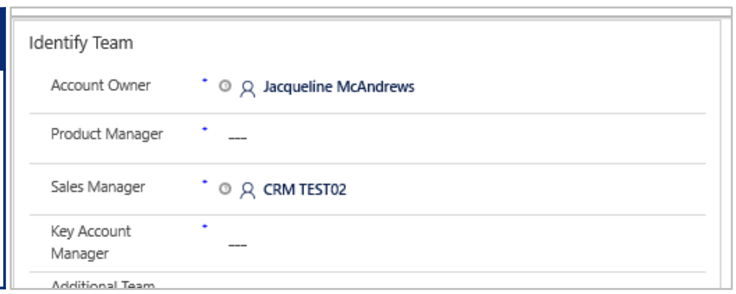
Sales Project – Customer Segmentation

1. Once the Sales Project has been initially saved, the **Customer Segmentation** section will be populated with the data from the Account. Only the **Country**, **Industry**, and **Strategic Group** fields will be populated with previous data.
2. Enter **<Region>**.
3. Enter **<Sub-Region>**.
4. Select the **High-Level Segment**, which should align to the **Strategic Group**.
5. Select the **Channel**.
6. Select the **Territory**.
7. Select the **Subterritory**.



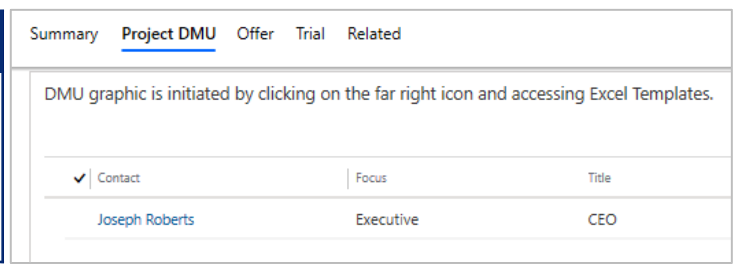
Sales Project – Customer Segmentation

1. Once the Sales Project has been initially saved, the **Identify Team** section will be populated with the data from the Account.
2. The user may enter any additional <Company Name>resources that were not initially identified using the **Additional Team Member** fields.



Sales Project – Customer Segmentation

1. Once the Sales Project has been initially saved, the **PROJECT DMU** tab will be populated with the data from the Account.
2. The user may enter any additional decision-makers relevant to the account by click **+ New DMU**.



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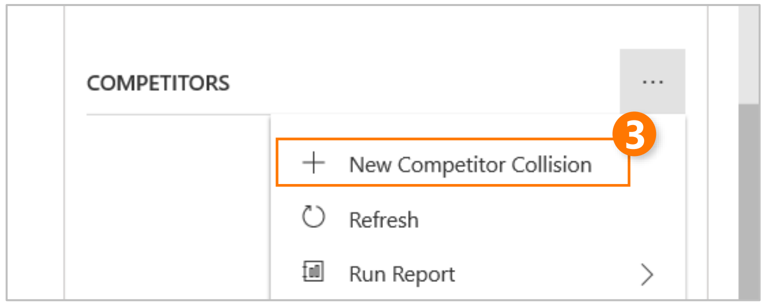
SALES PROJECT

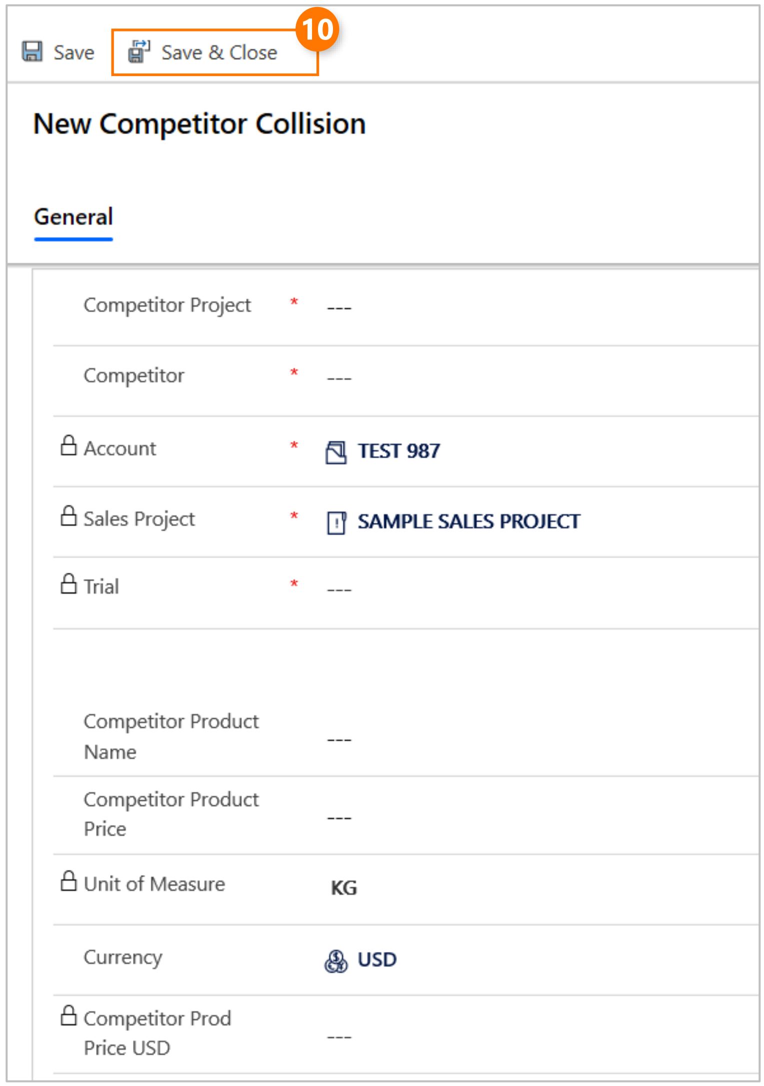
Sales Project – Competitor Collision

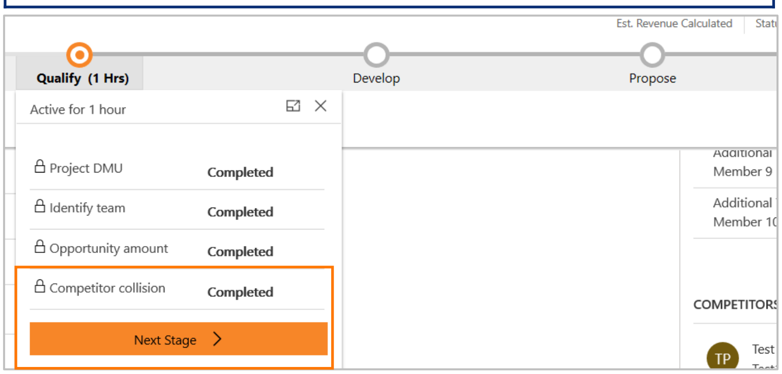
1. To move from the **Qualify** to the **Develop** stage, the user is recommended to complete the **Project DMU**, **Identify Team**, **Opportunity Amount**, and **Competitor Collision**. At this point in the process, first 3 items should be complete.

> ***Quick Tip:***
> For additional information on what CRM activities are recommended for each sales phase, refer to the **Sales Project Process** section of this QRG.

2. To complete the **Competitor Collision**, navigate to the **SUMMARY** tab of the sales project. Locate the **Competitors** section, found under the **Identify Team** section.
3. Add a new Competitor Collision by click **+ New Competitor Collision**. The **New Competitor Collision** page will open.
4. Enter the **<Competitor Project>** name.
5. Select the Competitor or add a new competitor by click **+ New Competitor**.
6. Enter the **<Competitor Product>** name.
7. Enter the **<Competitor Product Price>**.
8. If desired, enter a **<Strength>** about the competitor's product or offering.
9. If desired, enter a **<Weakness>**.
10. Click **Save** or click **Save and Close** to return to the Sales Project page.
11. The **Competitor Collision** activity under the **Qualify** stage will now be labelled **Completed**. Click **Next Stage** to move to **Develop**.

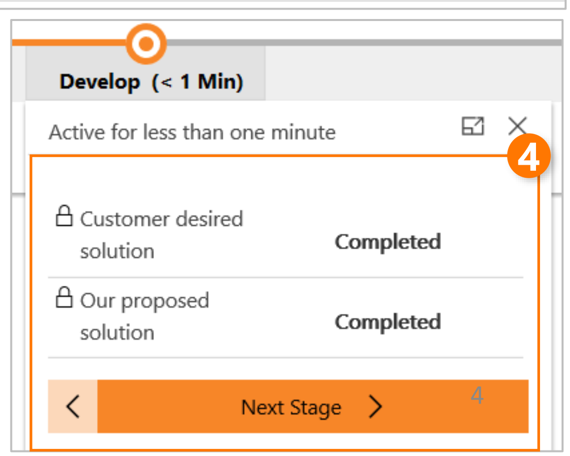






Sales Project – Develop

1. To move from the **Develop** stage to the **Propose** stage, the **<Customer Desired Solution>** and the **<Our Proposed Solution>** fields must be complete. These fields are located **Project Information** section of the **SUMMARY** tab.
2. If the user did not initially complete these fields, locate the **Project Information** section and enter the relevant information for these fields.
3. Click **Save**. If the **Save** button is not available at the top of the page, the user may use the **Save** button at the bottom-right corner of the window.
4. The **Customer Desired Solution** and **Our Proposed Solution** activities will now be labelled **Completed**. Click **Next Stage** to **Propose.**



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SALES PROJECT

Sales Project – Offer

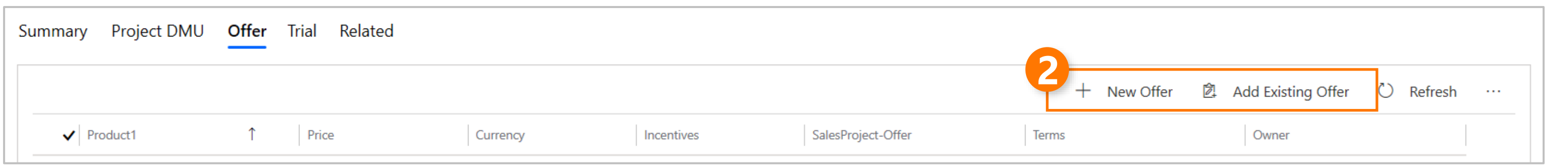
1. Click the **OFFER** tab.
2. Click **Add Existing Offer** to add an existing offer or click **+ New Offer** to open the **New Offer** page.

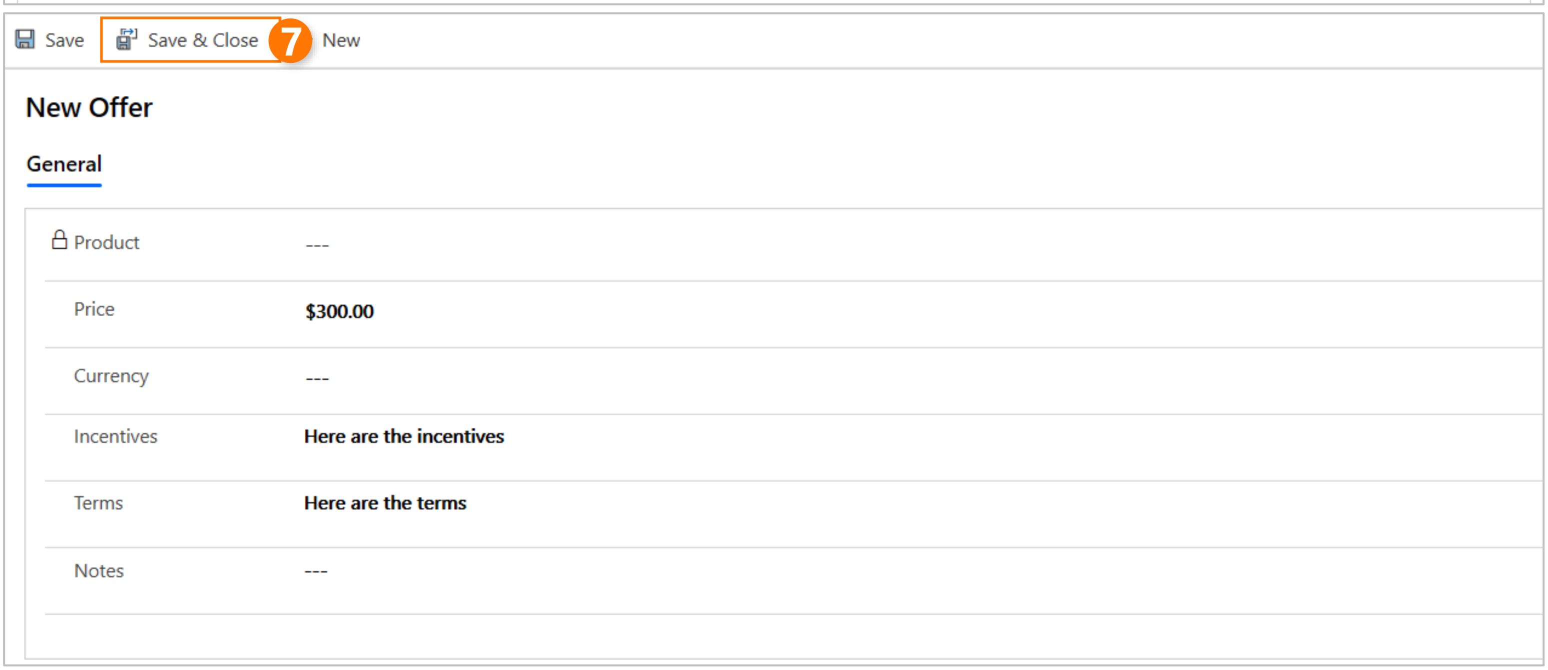
   Note:
   Once the required fields have been saved, the system will populate the **Product** field will the **Product** specified in the **SUMMARY** tab of the Sales Project.

3. Enter the **<Price per Product Unit>**.

   Note:
   Once the required fields have been saved, the system will populate the **Currency** field with the Sales Project's associated currency.

4. Enter any **<Incentives>** relevant to the offer.
5. Enter **<Offer Conditions>**.
6. Enter any additional **<Notes>** about the offer.
7. Click the **Save and Close** button to return to the **OFFER** tab. The newly created offer will now be visible.





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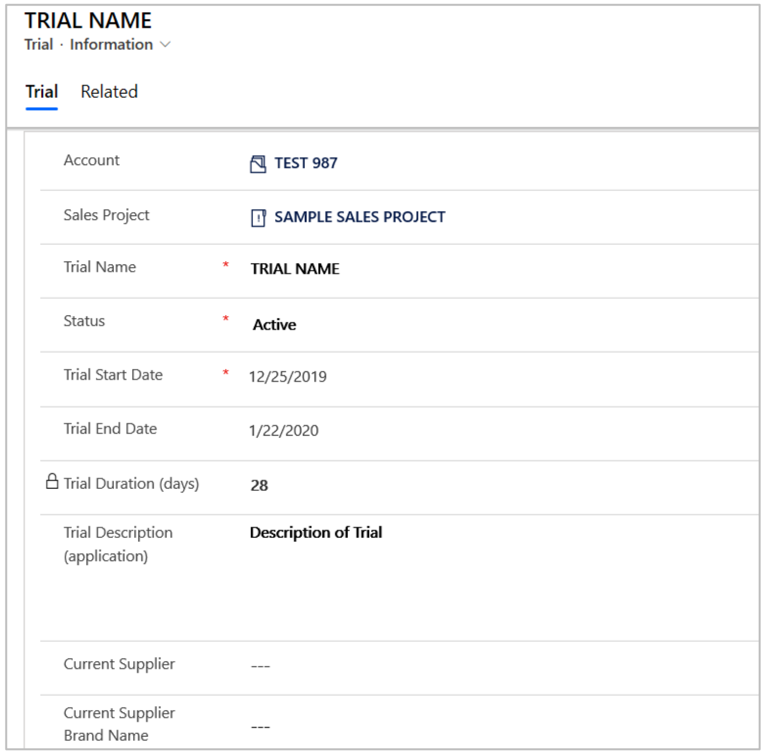
SALES PROJECT

Sales Project – Trial

1. Click the **TRIAL** tab.
2. To add an existing trial, click **Add Existing Trial**. To add a new trial, click **+ New Trial** to open the New Trial page.
3. Enter the **<Trial Name>**.

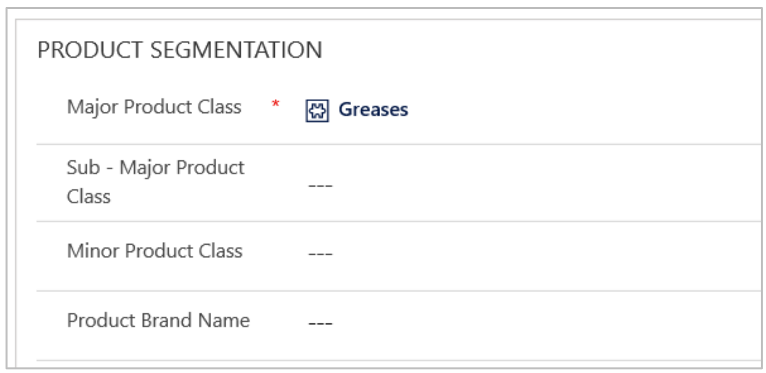
> ***Quick Tip:***
> For additional information on the data standards regarding the naming of *new* trials, please refer to the QRG #1 – Data Standards and Navigation.

4. Select the **Status** of the trial.
5. Select the **Trial Start Date**.
6. Select the **Trial End Date**.
7. Enter **<Trial Description (application)>**.
8. If applicable, enter the customer's **<Current Supplier>**.
9. Enter the customer's **<Current Supplier Brand Name>**.



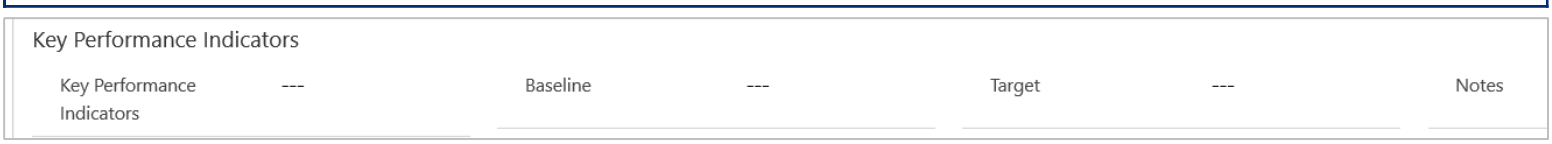
Trial– Product Segmentation

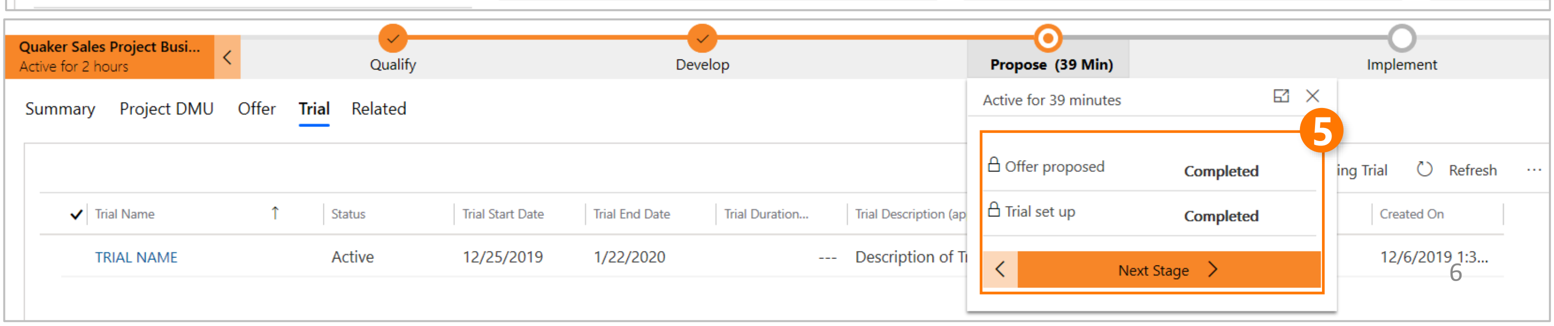
1. If applicable, enter the customer's **<Current Supplier>**.
2. Enter the customer's **<Current Supplier Brand Name>**.
3. Select the **Major Product Class**.
4. Select the **Sub-Major Product Class**.
5. Select the **Minor Product Class**.
6. Select the **Brand Name**.



Trial – Key Performance Indicators

1. If applicable, enter **<Key Performance Indicators>**.
2. Enter the **<Baseline>**.
3. Enter the **<Target>**.
4. Enter any relevant **<Notes>** about the KPIs.
4. Click **Save and Close** to return to the **TRIAL** tab.
5. The **Offer Proposed** and **Trial Set Up** activates under the **Propose** stage will now be labelled **Completed**. Click **Next Stage** to move to **Implement**.





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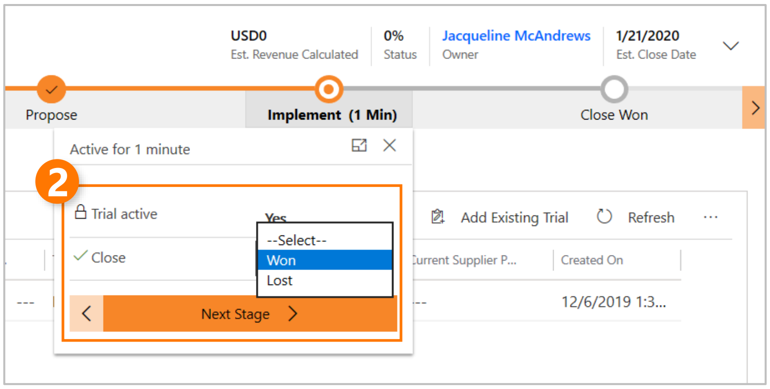
SALES PROJECT

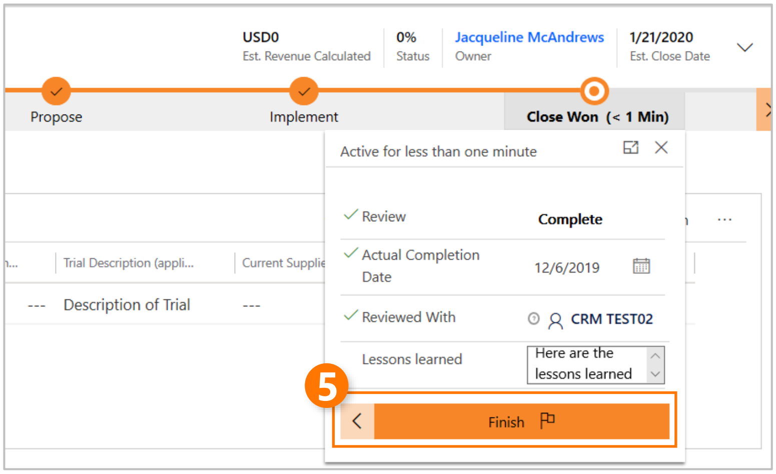
Implement

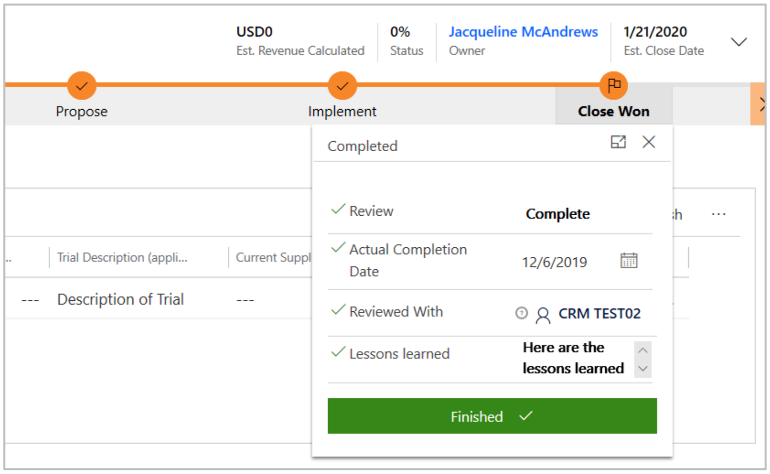
1. To move from the **Implement** stage to the **Close Won/Lost** stage, select whether the sales project has been **Won** or **Lost**.
2. Click **Next Stage** to move to **Close Won/Lost**. Click **Next Stage** to move to **Implement**.



Close Won/Lost

1. To finish this stage, select whether the internal **Review** has been completed.
2. Select the **Actual Completion Date** of the review.
3. Select the <Company Name>resource in the **Reviewed With** field.
4. Enter any **<Lessons Learned>** from the sales project.
5. Click **Finish** to complete the sales project.





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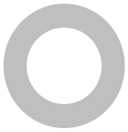
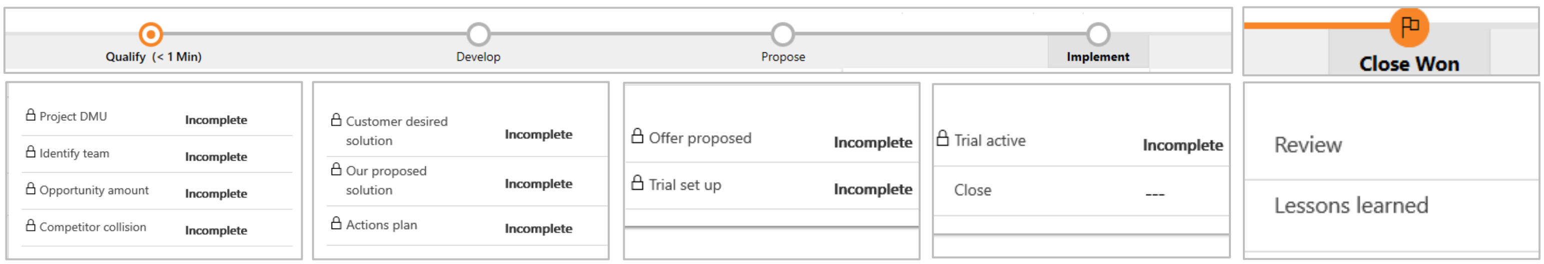
SALES PROJECT PROCESS

LEGEND		
Completed	**In Progress**	**Not Started**
		

Sales Project Stages

***Note:*.**
As a best practice, the user should complete the recommended activities for each sales phase, but the user also has the option to move to the next stage by manually checking off the recommended activities for each stage and selecting **Next Stage.**



Qualify →	Develop →	Propose →	Implement →	Close Won/Lost
Gather data to determine whether customer is worth the pursuit. Assign <Company Name>resources.	Identify the customer's need, propose a solution, and outline the actions necessary for the sales project.	Demonstrate Quaker Houghton's value and solution to the customer's need through a proposal of an offer and trial.	Initiate the trial and encourage customer buy-in. Determine the success of sales project.	Review internally of lessons-learned based on whether sales project was won or lost.
Activities Recommended for Completion	**Activities Recommended for Completion**	**Activities Recommended for Completion**	**Activities Recommended for Completion**	**Activities Recommended for Completion**
• Project DMU • Identify Team • Opportunity Amount • Competitor Collision	• Customer Desired Solution • Our Proposed Solution • Action Plan (GKA)	• Offer Proposed • Trial Set Up	• Trial Active • Close (Won/Lost)	• Review • Lessons Learned