# opportunity management guide

Opportunity owner – staff member who will manage the opportunity and follow up

Team – teams staff are part of are options

## DEFINE EACH SOURCE

Opportunity source (not customisable) – Define each source i.e. Client/Customer = existing participant

* Call (cold)
* Call (warm)
* Client/Customer
* eMarketing
* Referral
* Search engine
* Training
* Social media
* Other

Create a table of average values to support the correct collection of information. These can be adjusted as the opportunity progresses.

## DEFINE EACH OPPORTUNITY TYPE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type | Follow Up  | Expected date | Upfront value | Recurring value |
| Supported employment | 1 day | 12 days  | $500 | $2000 |
| Support coordination | 1 day  | 14 days  | $2000 | $4000 |
|  |  |  |  |  |
|  |  |  |  |  |

* Opportunity type – Define each type
* Recurring annual value – Define each type
* Opportunity stage ¬– Update stages
* Follow-up – Define each type
* Expected date – Define each type
* Expiry interval – Only use when the funding or date for the opportunity will expire

## DEFINE % CHANCE OF SALES

One concept for managing % change of sales is as below.

|  |  |
| --- | --- |
| Stage | Percentage |
| Enquiry | 10 |
| Proposal | 20 |
| Trial | 80 |
| Waitlist | 50 |
| Result | 100 successful0 unsuccessful |

## DEFINE REASONS FOR SALE RESULTS

Update and define the reasons for sales successful/unsuccessful