STAR

The Professionals' Choice

StarPM: Opportunity Tracking

User Guide

Copyright

Author: David Simpande, Tim Owen

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Introduction

StarPM: Opportunity Tracking allows users to record business opportunities from the moment they are first identified, and to track those track opportunities as they become new clients or new services for existing clients.

Any user with the appropriate permissions can create, edit and delete opportunities. Additional permissions permit the editing and/or the creation of opportunities owned by other Staff members.

Opportunity Ownership

Newly created business opportunities will relate to either:

- An existing clients or
- A contact (individual or organisation) who is not yet a client, but will become one if the Opportunity is realised.

Each new Opportunity must be allocated to an owner, who will be the member of staff responsible for managing that Opportunity and, hopefully, bringing it to a successful conclusion.

Details of both the client or contact and the Staff member to whom the Opportunity has been assigned are recorded by mandatory fields when setting up or recording an Opportunity.

Replace Terms

Many of the standard terms used throughout any 'vanilla' installation of StarPM can be replaced by synonyms. This is useful, for instance, when Star terminology does not reflect the standard lexicon of your organisation.Star refers to such synonyms as Replace Terms.

Replace Terms are defined in Star PDM, in Firm Details.

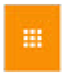
This Help manual uses standard terms throughout.

If your organisation has defined any Replace Terms in Star, you can record them for future reference against the relevant Standard Terms in the Table of Replace Terms included at the end of this document.

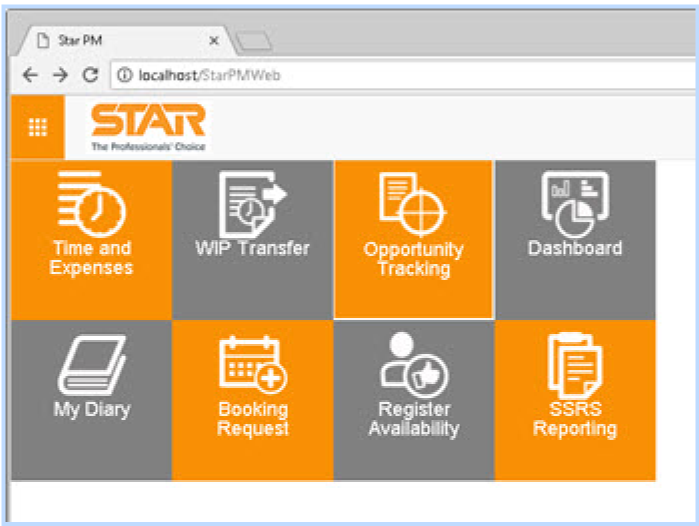
Accessing Opportunity Tracking

To access Opportunity Tracking:

1. Launch StarPM.
2. Click the StarPM menu icon to the left of the Star logo.

   This toggles open the main menu:

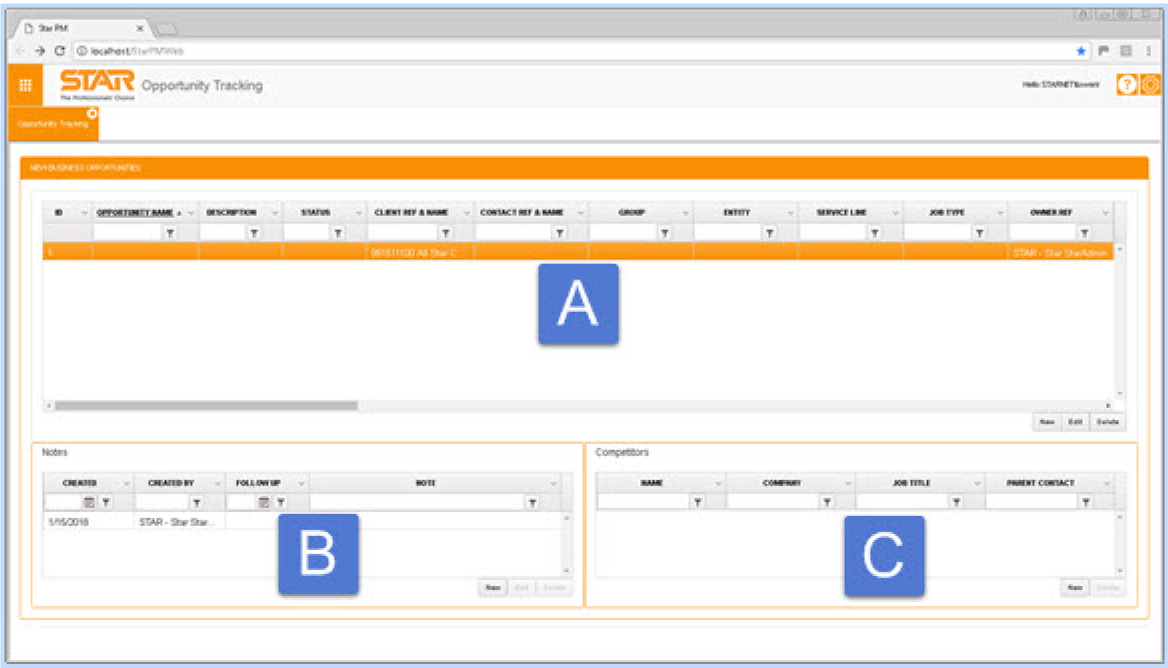
3. Click **Opportunity Tracking**.

   The Opportunity Tracking module is displayed in the same tab, replacing the StarPM main menu, with [New Business Opportunities] as the default view.

The New Business Opportunities Grid

The **New Business Opportunities** grid on the Opportunity Tracking homepage is subdivided into three regions:

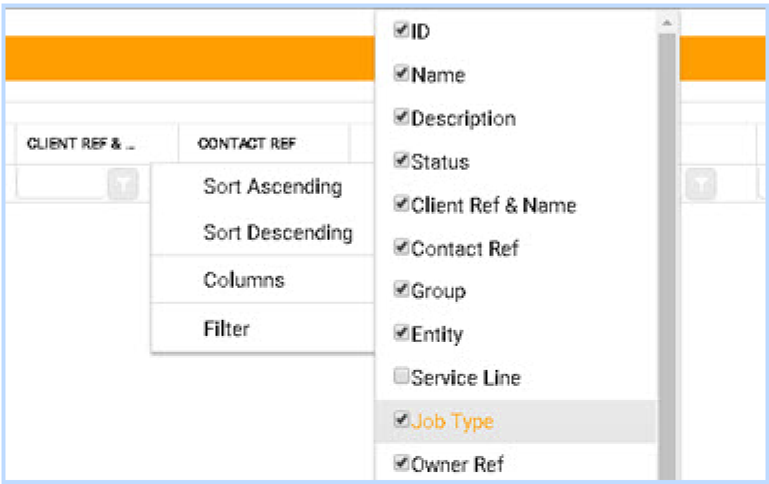
- The upper region (**A** in the graphic below) presents a grid view of any recorded opportunities.
- At bottom left (**B**), the **Notes** region, displays any Notes relating to the Opportunity currently selected above.
- At bottom right (**C**), the **Competitors** region, displays the details of any competitors relating to the Opportunity currently selected above.



Column Selection

In the upper region, you can select which columns are displayed and which are hidden.

1. Click the right hand side of any column header to activate a context menu.
2. Select **Columns**.
3. Click to select or de-select the appropriate column checkboxes, selecting only those that you want to be displayed.



Column Sizing

To resize a column:

1. Rest your cursor over a column header separator to activate the drag control, and left-click to grab.
2. Drag the column header to the desired width, and release.

Your grid settings will be saved once you navigate away from the screen, and reapplied when you return.

Input Validation

Each organisation can specify which of the individual fields in the Create or Edit New Business Opportunity screens are Optional, Important, or Mandatory for users to define. This is done during application setup.

Mandatory fields, which must be completed before the Opportunity can be saved, are indicated by this icon .

All other fields are optional, but those deemed to be Important - as indicated by this icon  - should be defined wherever possible.

Validation icons disappear once data has been entered into the relevant fields. If inputs are later erased from those fields, then the validation icons will reappear.

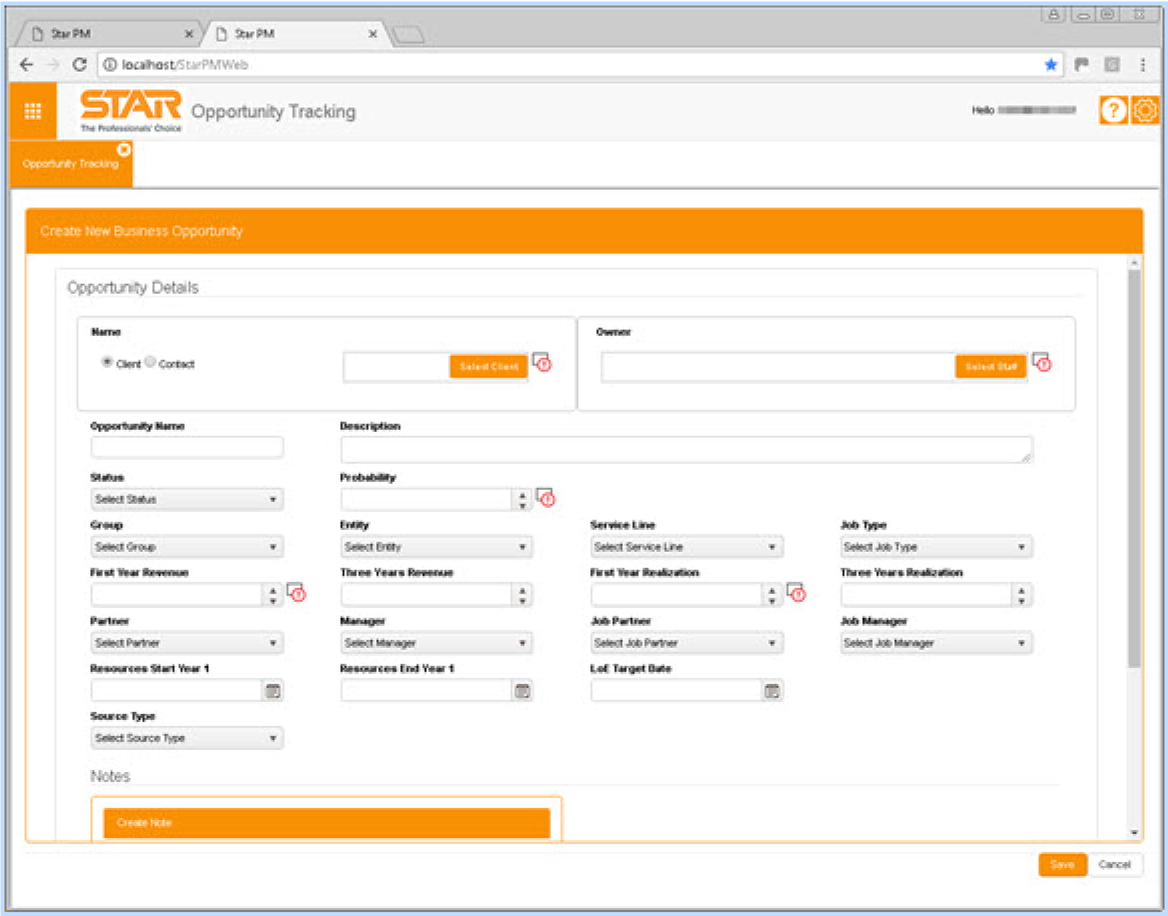
Creating an Opportunity

To create a new business Opportunity:

1. In the upper region of the **New Business Opportunities** grid, click **New**.

   This displays the Create New Business Opportunity screen.

   If you do not have the Staff Privileges required to create a new Opportunity, then the **New** button will be disabled (inactive).



   This screen records the details of the new Opportunity.

   Each organisation can define which of the fields in this screen are Mandatory, Important or Optional for each Opportunity, and these fields are flagged. For details, see Input Validation.

2. In the **Name** region, at top left in the Opportunity Details, select the Client or Contact to whom the Opportunity relates (see Opportunity Ownership), as follows:

   i. Select the appropriate contact radio button, **Client** or **Contact**. This toggles the functionality of the orange button in the adjacent field between **Select Cliet** and **Select Contact**. Click either Select Client, to display the Client Selector, or Select Contact to display the Contact Selector.

   ii. In the Selector, search for and select the relevant Client or Contact, and click **Select**. The selector is then closed and the **Name** field is updated with the name of the selected Client or Contact.

3. In the **Owner** region, select the Staff to be assigned ownership of this Opportunity.

> This field may be pre-populated with your Staff name, but if you have the necessary Staff Privileges, you may see a **Select Staff** option.

To select the Opportunity's Owner:

i. Click **Select Staff** to display the Staff Selector.
ii. In the Selector, search for and select the relevant Staff, and click **Select**. The selector is then closed and the **Owner** field is updated with the name of the selected Staff member.

4. Record the following details:
   - **Opportunity Name** - Enter the name by which the Opportunity will be identified.
   - **Description** - Enter a brief description of the Opportunity.
   - **Status** - Select a pre-defined Opportunity Status from the drop-down list.
   - **Probability** - Enter a probability of realisation, as a percentage value. Optionally, use the up/down click control to adjust the value, one percent per click.
   - **Entity** - Select the firm entity to which income from the Opportunity will accrue.
   - **Service Line** - Select the service line to which the Opportunity relates.
   - **Job Type** - Select the Job Type that the work will fall into if the Opportunity is realised. Selection may be restricted to Job Types pertinent to the previously selected Service Line.
   - **First Year Revenue** - Enter an estimate of the revenue achievable in Year 1 if the Opportunity is realised.
   - **Three Years Revenue** - Enter an estimate of the revenue achievable in Years 1 to 3 if the Opportunity is realised.
   - **First Year Realisation** – Enter an estimated realisation for year 1, as a percentage.
   - **Three Years Realisation** - Enter an estimated realisation in years 1 to 3, as a percentage.
   - **Partner** – Select the Partner responsible for handling this Opportunity.
   - **Manager** – Select the Manager responsible for handling this Opportunity.
   - **Job Partner** – Select the Partner responsible for any work if the Opportunity is converted into new business.
   - **Job Manager** - Select the Manager that will be responsible for any work if the Opportunity is converted into new business.
   - **Resources Start Year 1** – Click the calendar control to select the first date in year 1 from which staff will be required if the Opportunity is converted into new business.
   - **Resources End Year 1** - Select the last date in year 1 on which staff will be required if the Opportunity is converted into new business.
   - **LoE Target Date** – Select the target date for achieving a successful Letter of Engagement or contract.
   - **Source Type** – Select the means by which this Opportunity was discovered, e.g. advertisement, referral. The Source type list is defined during application setup. If the selected value is linked to a source, you will be prompted to record (select) the Staff member, Client or Contact from whom the Opportunity was gained. If source type is linked to a campaign, you will be prompted to record (select) the marketing campaign from which the Opportunity was generated.
5. In the **Notes** region: Enter any additional notes regarding the Opportunity, and select a **Follow Up Date**.
6. Click **Save**.

   The Opportunity is created and you are returned to the Opportunity home page.

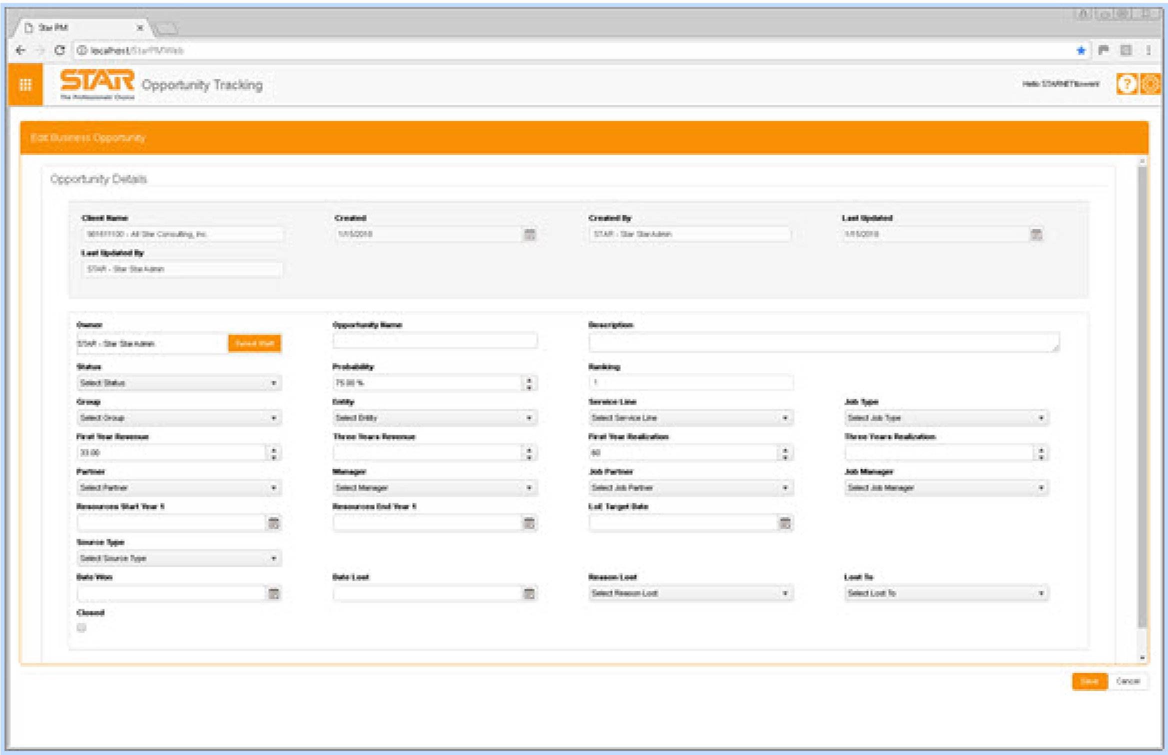
Editing an Opportunity

To edit an Opportunity:

1. In the New Business Opportunities screen, select the relevant Opportunity.
2. Click the **Edit** button at the foot of the grid.

   This displays the Edit Business Opportunity screen, pre-populated with data relating to the selected Opportunity.

   If you do not have the Staff Privileges required to edit this Opportunity, then the **Edit** button will be disabled (inactive).

   Each organisation can define which of the fields in this screen are Mandatory, Important or Optional for each Opportunity, and these fields are flagged. For details, see Input Validation.

   The upper region, distinguished by grey highlight, displays the following details, none of which can be edited:

   - **Client Name** or **Contact Name** – Dependent on whether this Opportunity, when created, was assigned to a Client or Contact.
   - **Created** – The date on which this Opportunity was created.
   - **Created By** – The name of the Staff member who created the Opportunity.
   - **Last Updated** – The date on which this Opportunity was last edited.
   - **Last Updated By** – The name of the Staff member who last edited this Opportunity.

   In the lower region of this screen the following field is also read-only:

   - **Ranking** - The numeric ranking of the Opportunity, in relation to other Opportunities recorded in the system. Opportunity ranking is calculated automatically, according to criteria defined by your organisation.

3. Edit the remaining **Opportunity Details** as required.

> If you do not have the Staff Privileges required to change the ownership of this Opportunity, then the **Select Staff** button in the **Owner** field will be disabled (inactive).

The following fields are new to this screen:

- **Date Won** – Select the date on which the Opportunity was converted into new business.
- **Date Lost** - Select the date on which the Opportunity was agreed to have been lost.
- **Reason Lost** – Select the reason for which the Opportunity was lost.

  The list of Reasons available for selection is as defined during application setup.
- **Lost To** – Select the Competitor to which the Opportunity was lost.

  The list of Competitors available for selection is as defined during application setup.

For the remaining field definitions, see Creating an Opportunity.

4. Click **Save** to record your changes.

   The Opportunity record is updated, and you are returned to the New Business Opportunities screen.

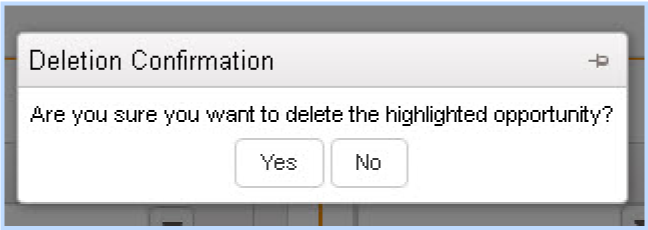
Deleting an Opportunity

To delete an Opportunity:

1. In the New Business Opportunities screen, select the Opportunity for deletion.
2. In the upper region of the **New Business Opportunities** grid, click **Delete**.

   You are prompted to confirm the deletion.

   If you do not have the Staff Privileges required to delete Opportunities, then the **Delete** button will be disabled (inactive).

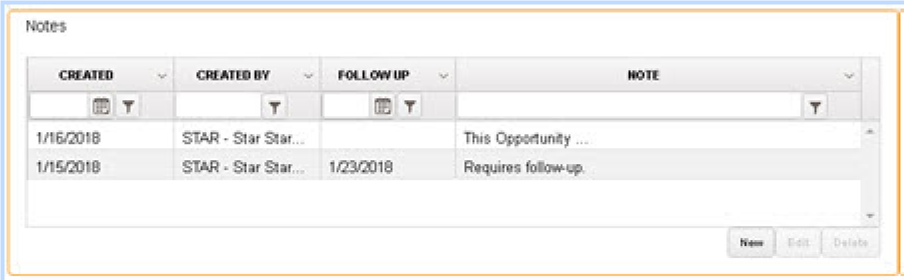
   

3. Click **Yes** to confirm the deletion.

   The Opportunity is deleted, and you are returned to the New Business Opportunities screen.

Opportunity Notes

Each Opportunity can be annotated, with any Notes relating to a particular Opportunity being displayed in the **Notes** region of the New Business Opportunities screen only when that Opportunity is selected in the main grid.



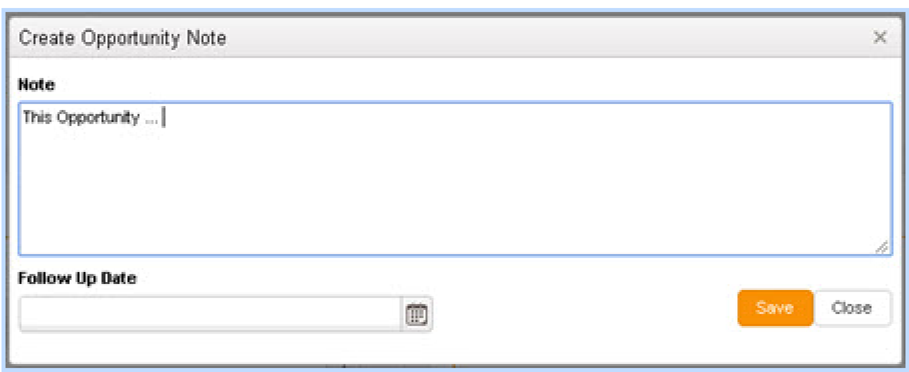
If you do not have the Staff Privileges required to create, edit, or delete Opportunity Notes, then the respective button(s) will be disabled (inactive).

Create a Note

To create an Opportunity Note:

1. Select the relevant Opportunity in the main New Business Opportunities grid.
2. Click **New** at the foot of the Notes grid.

   A Create Opportunity Note window is displayed.
3. Type your note into the **Note** field.

   The Note field is mandatory. Line breaks are supported.
4. Click the calendar icon to select a **Follow Up Date** from the drop-down calendar.

   The Follow Up Date is optional.
5. Click **Save**.

   Your Note is saved, the Create Opportunity Note window is closed automatically, and your Note is added to the **Notes** grid.

Edit a Note

To edit an Opportunity Note, with the relevant Opportunity selected in the main New Business Opportunities grid, simply select the Note in the **Notes** grid and click **Edit** at the foot of that grid. the Note is then displayed in an Edit

Opportunity Note window, which is identical - in all but title - to the Create Opportunity Note window.

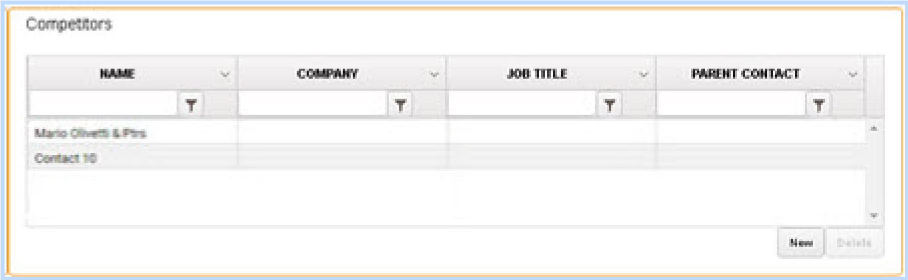
Delete a Note

To delete an Opportunity Note, with the relevant Opportunity selected in the main New Business Opportunities grid, simply select the Note in the **Notes** grid and click **Delete** at the foot of that grid. You are prompted to confirm the deletion.

Competitors

One or more Contacts can be flagged as Competitors for any given Business Opportunity.

Any known Competitors should be listed as such in the **Competitors** region of the New Business Opportunities screen.



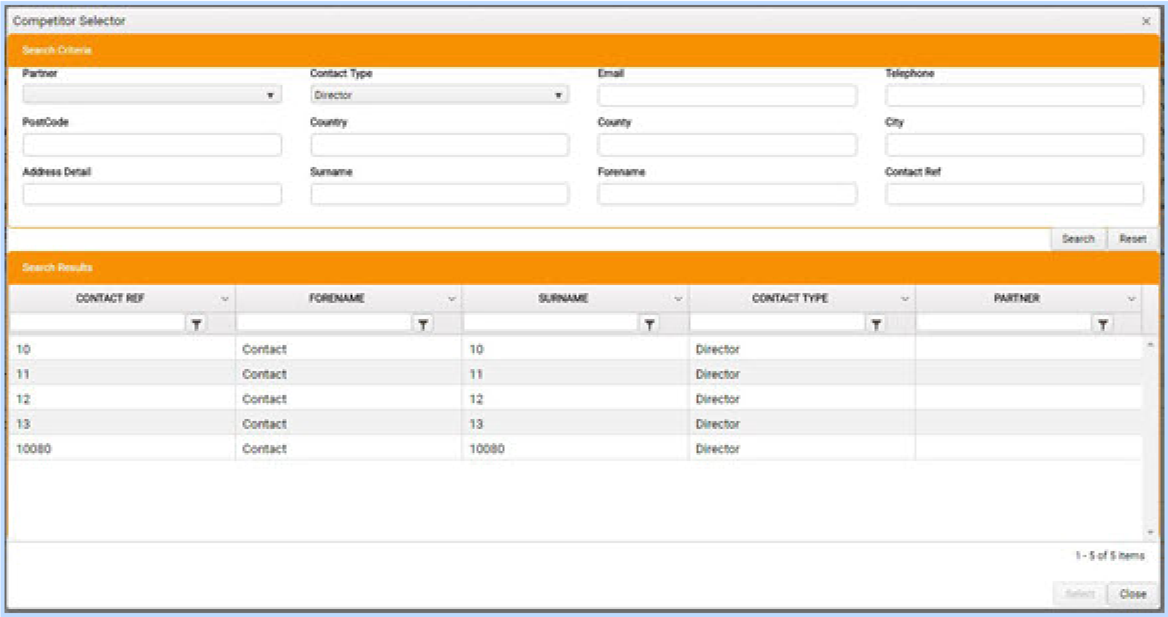
If you do not have the Staff Privileges required to create or delete Competitors, then the respective button(s) will be disabled (inactive).

Add a Competitor

To flag a Contact as a Competitor for a Business Opportunity:

1. Select the relevant Opportunity in the main New Business Opportunities grid.
2. Click **New** at the foot of the Competitors grid.

   The Competitor Selector is displayed.



3. In the Selector, populate any **Search Criteria** filters with values known to match those of the Contact you want to select.
4. Click **Search** to apply a search for the relevant Contact.
5. Select the appropriate Contact within the **Search Results** grid.
6. Click **Select**.

The Selector is closed, and the selected Contact is listed as a Competitor in the **Competitors** grid whenever the relevant Opportunity is selected.

Delete a Competitor

To disassociate a Competitor from a Business Opportunity, with the relevant Opportunity selected in the main New Business Opportunities grid, simply select that Competitor in the **Competitors** grid, and then click **Delete** at the foot of that grid. You are prompted to confirm the deletion.

Appendix: Table of Replace Terms

The following standard terms, as used throughout any 'vanilla' installation of StarPM, can all be replaced by synonyms. This is useful when Star terminology does not reflect the standard lexicon of your organisation.Star refers to such synonyms as Replace Terms.

Replace Terms are defined in Star PDM, in Firm Details.

This Help manual uses standard terms. If your organisation has defined any Replace Terms, you can print the following table and record them for future reference against the relevant Standard Terms.

Standard Term	Replace Term	Standard Term	Replace Term
AddressDetail		GrossWIP	
AdvancedBill		Holiday	
AdvancedReportLink		Interest	
AllowancePremium		Interfunction	
ApprBill		InternalContact	
BadDebt		Job	
BillsInProgressFor		JobAssistant1	
BillsReadyFor		JobReference	
BillTemplate		LastActivity	
BillType		LastBill	
Campaign		LeaveDate	
ChargeAccount		Loss	
Child		Manager	
Children		Nominal	
Claim		NominalAdjustment	
Client		Office	
ClientFirstName		Officer	
ClientGroup		OrigRateAmt	
ClientMobile		Parent	
ClientReference		Partner	
ClientSearchName		PlanningColour	
ClientTelephone1		PopBalancesDate	
ClientTelephone2		PORef	
ClientType		Portfolio	
Clone		Postcode	
Cloning		Profit	
Contact		QuickBill	
ContactFirstName		RevisedFee	
ContactMobile		SecondContact	
ContactReference		SecondPeriodClose	
ContactSecondName		ServiceLine	
ContactTelephone1		ServiceLineGroup	
ContactTelephone2		StaffDepartment	

Standard Term	Replace Term	Standard Term	Replace Term
ContractType		StaffForename	
County		StaffMobile	
CurrentDisb		StaffReference	
CurrentFees		StaffSurname	
CurrentPreBill		StaffTelephone1	
CurrentWIP		StaffTelephone2	
DepartmentsJobs		StaffType	
Disbursement		Stage	
DraftBillsFees		StandardBill	
DraftBillsWIP		StdRateAmt	
Enquiry		Supervisor	
Enrolment		Supplier	
EOMBills		SupplierRef	
EOMDisb		TargetRealisation	
EOMPreBill		Tickler	
EOMWIP		TimeStampField	
Expense		TotalAppr	
ExpenseRepaid		UnapprovedDisb	
Favourite		UnapprovedWIP	
Fee		UnderQuery	
FeeReceipt		VAT	
Fees		VatNumber	
FinanceCharge		WIPatCost	
FixedFee		Workgroup	
GeneralAdjustment			