



At the end of this module you will be able to:



Understand the Opportunity Process



Manage an Opportunity through the Whole Sales Process



Transfer an Opportunity to another Hotel



Definition



Opportunities

**A recognized potential to
sell an Accor Offer to a
Prospect or a Customer**

- Annual Corporate Contracts
- Meeting and Events ad-hoc offers
- Leisure Group ad-hoc offers

An Opportunity initiates and monitors the Sales Process for new business and business renewals

Benefits

- ✓ Increase predictability of the business
- ✓ Optimize your pipeline management of Opportunities
- ✓ Track business trends Client by Client



Definition



Opportunities

Pipeline management



Contract Header



Folder

Contract management



Definition

Central Opportunities



Hotel Opportunities

- Created by a Central ANAIS User
- Include several hotels
- Not visible to hotels
- All Hotels can see the contract headers when Account is visible
- Hotels included in the Contract can see the ASA folder

- Created by a Hotel User
- Include only 1 hotel
- Not visible to other hotels
- Visible to all Central members
- If created on a Strategic or Key Accounts, Account owner receives a notification



All previous ASA contracts are migrated into ANAIS as Opportunities. Owner of these Opportunities is the Sales Contact (previous Hotel Champion) but the owner can change the ownership to anyone else from the hotel



Opportunities should be created and managed in A.N.A.I.S.

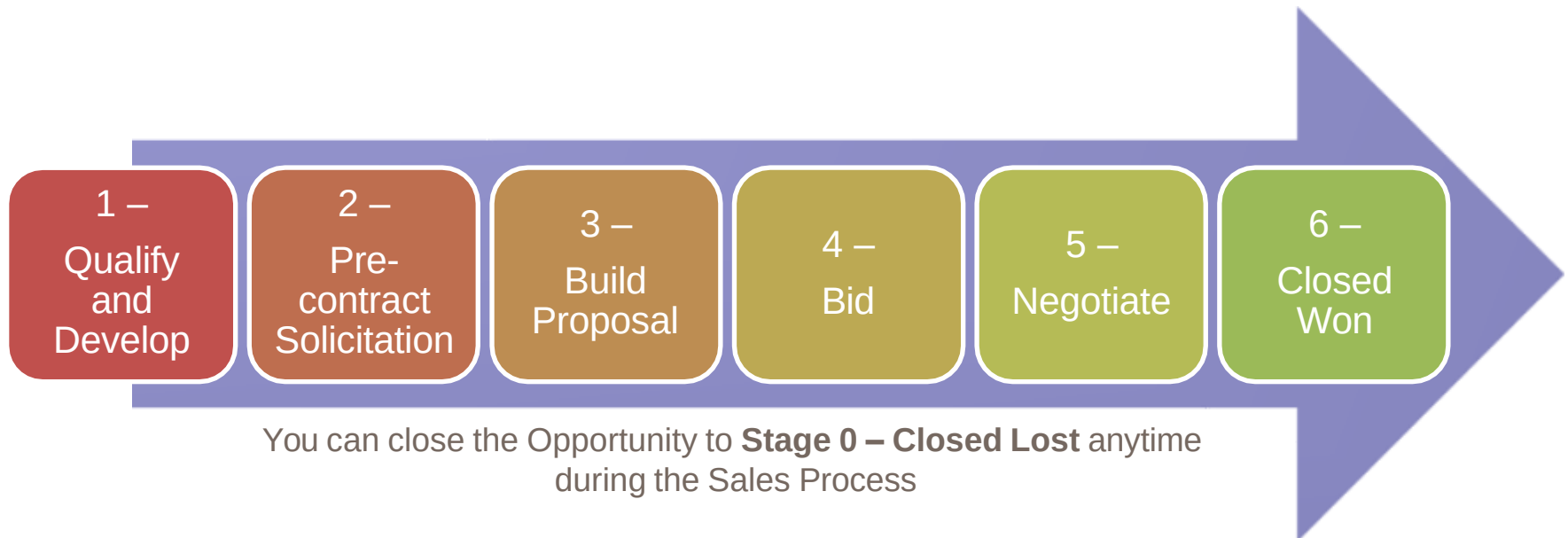
The Opportunity owner is responsible for all the **data and pipeline accuracy** related to his/her Opportunities



All data related to **Opportunities** shall be written in **English** for all Accounts



A harmonized Sales Process for all Accor Segments



- **Contract Management is handled in ASA**, an integrated tool within ANAIS
- ASA is accessible through **Mash Ups** directly from ANAIS

Create the Opportunity and Qualify the Need

Stage 1 Qualify and Develop

The Client tells you about a potential need for a contract with your hotel

- **ANAIS Hotels** : Create the Opportunity in stage 1 and define the need (type of offer, dates, budget ...)

Stage 2 Pre- contract Solicitation

- **ANAIS Hotels** : Move the Opportunity in stage 2. ANAIS will automatically create an ASA Folder in status «Project»



These 2 steps can be merged : in this case create the opportunity directly in stage 2, enter all details and save

Pre-select Hotels and Make a Proposal to the Client

3 – Build Proposal

ASA Mash Up : Select services, stays or rates in ASA and move hotel Status into «selected »

ANAIS Hotels : Move the Opportunity in stage 3

4 – Bid

Send proposal to Client

ASA Mash Up : Move ASA Folder status into «Proposal». ASA will automatically move ANAIS Hotels in stage 4



These 2 steps can be merged : in this case, in the ASA mash up, Select your hotel (Status: «Selected») and services/stays/rates in ASA and Move ASA Folder status into «Proposal»

Negotiate with the Client and Confirm Selected Hotel(s)

5 –
Negotiate

Negotiate with Client
ANAIS Hotels : Move the Opportunity in stage 5

6 –
Closed Won

Sign the contract
ASA Mash Up : Move ASA Folder status into «Confirmed». ASA will automatically move ANAIS Hotels in stage 6



These 2 steps can be merged

0 –
Closed Lost

Contract is lost
ASA Mash Up : Move ASA Folder into «Hotel Refusal», «Client Refusal» or «Cancelled». ASA will automatically move ANAIS Hotels in stage 0.



The Opportunity visibility rules and rights are:

	Opportunity Owner	Other users from the same hotel	Other users from different hotels
View	✓	✓	⊘
Create	✓	✓	⊘
Modify	✓	✓	⊘
Transfer to other hotels	✓	⊘	⊘
Delete	⊘	⊘	⊘

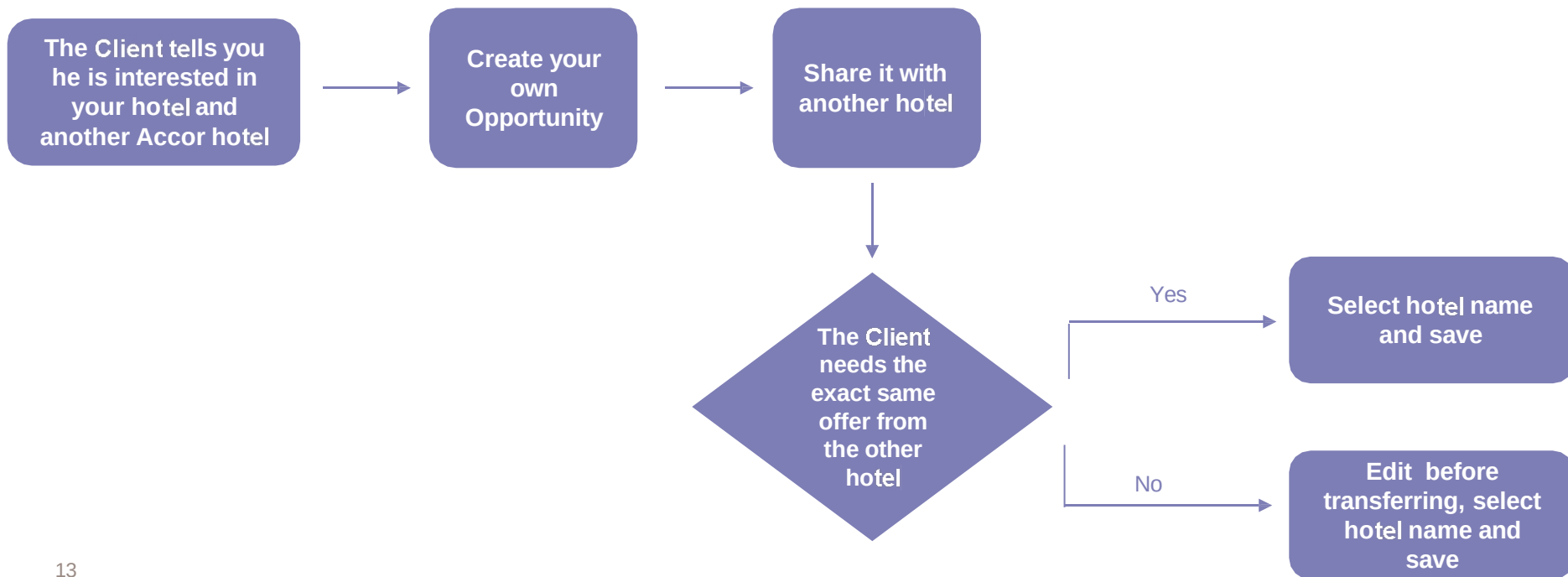
Hotel users can transfer an Opportunity to another hotel.

Whatever the stage of the Opportunity you want to transfer, ANAIS will clone it in **Stage 1** and will transfer it to the hotel you selected

You can decide to modify a few fields (staying dates, budget, offer type ...) and add comments before sending it to the other hotel

The Sales Contact of the Hotel you picked will receive a Notification and will be owner of the new Opportunity

As soon as the Opportunity is transferred, you loose visibility rights on the Opportunity



Central Users opportunities are NOT accessible to Hotel Users :

- Hotel Users can access the Contract Headers from the Account page
- Only when their hotel is included in the Contract, will they be able to enter the ASA Mash Up
- The ASA Mash Ups displays the list of all Hotels included in the Contract, but the rate are not accessible (except for their own hotel)

Contract Headers									
Action	Contract Header Name	Offer Group	Main Contact	Opportunity	ASA Folder Number	Start Date	End Date	Currently Active	ASA Folder Status
	CH-1550205	Meeting and Events Ad-hoc Offer	Samantha Gordon	IBM - Annual Conference - August 2015	1550205	21-8-2015	23-8-2015		Confirmed
	CH-1550206	Meeting and Events Ad-hoc Offer	Annette Smith	IBM - Committee member meeting - February 15	1550206	21-2-2015	21-2-2015		Project
	CH-1550208	Annual Corpo and Distributors	Annette Smith	IBM - Annual Contract - 2014	1550208	21-7-2014	31-12-2014	✓	Project
	CH-1550209	Meeting and Events Ad-hoc Offer	Annette Smith	Test	1550209	22-7-2014	22-8-2014	✓	Confirmed
	CH-1550211	Annual Corpo and Distributors	Samantha Gordon	IBM - Annual Contract 2014	1550211	1-1-2014	31-12-2014	✓	Confirmed

All Contract Headers are accessible to all Hotels having access to the Account

>> IBM >> Mrs. Samantha Gordon >> 1550211 (Local tax rubric)						
Folder	Hotels	Complementary Offer	Sales cond.	Agencies	Beneficiaries	Documents
						GPS loading
						Payment
						History
Update status						
1 200						
Hotel ID	Hotel name	City / Town	Country	Rate level	Status	Row
0649	IBIS AMSTERDAM AIRPORT	BADHOEVEDORP	NETHERLANDS	CP1	Selected	1
3646	WB SOfITEL MONTREAL GOLDEN MILE	MONTREAL	CANADA	CP13	Selected	2
Results 1 - 2 of 2.						

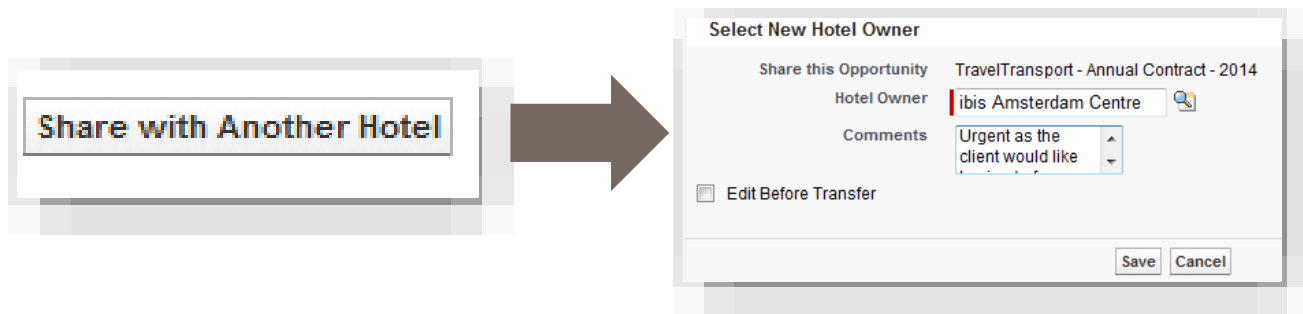
ASA Folder and list of hotels contracted are only available when your hotel is included in the Folder

Hotel Users can create their Opportunity including their Hotel only

- For any Opportunity created on a Key or Strategic Account, the Account Owner will receive a notification
- Hotel Users must create all Corporate Annual Contracts in ANAIS so that the rate is available in TARS
- Creation of Leisure Group and Ad-hoc group Opportunities is not mandatory for them
- The Opportunity E-module includes the creation of Contracts in ASA Mash-Ups

Hotels Users can transfer an Opportunity to another Hotel

- Let other Hotels know that they also have a potential business with the Client
- User 1 creates his own Opportunity and sends a copy to User 2. As soon as the copy is sent, User 1 cannot access it anymore. User 2 can work on his new Opportunity



During this demo, we will show you how to:



View an Opportunity

- Opportunity Homepage
- Opportunity Search
- Opportunity Page
- Opportunity Related list



Manage an Opportunity
through the whole Sales
Process

- Sales Process Management
 - Process Step by Step
 - Documents
 - Contract Renewal



Transfer an Opportunity to
another Host

- Process Step by Step



View an Opportunity

- View Opportunity Homepage
- Search
- View Opportunity Page and Related list

The Opportunity tab displays a Homepage that allows you to quickly create and locate Opportunities

Contacts **Opportunities** Hotel Recommendations Leads Sales Offers Cases Reports Dashboards Accounts (Hotel View) Contacts (Hotel View)

Opportunities Home

View: Recently Viewed Opportunities Select your view to display Opportunities

Recent Opportunities

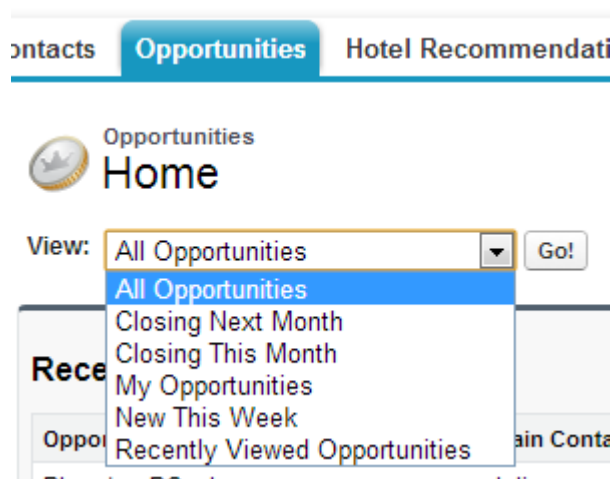
Opportunity Name	Account Name	Main Contact	Owner Last	Offer Type	Offer Group
Bluesky - BG - Jan 2014	Bluesky	Julien Dubuis	POZZO	Corporate - Company Contract	Annual Corpo and Distributors
Test Opportunity #1	IBM	Bellamy	EUR 100 000,00 31/10/2013 0 - Closed Lost	Corporate - Company Contract	Annual Corpo and Distributors

Click on the **New** button to go to the Opportunity creation page

Look for an existing Opportunity

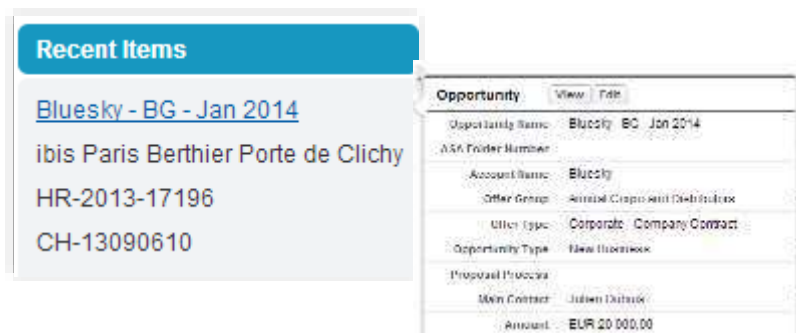


Use the **Search bar** and enter part or complete Opportunity name



Use the **Available Views** to filter on the Opportunities:

- All Opportunities
- Closing Next Month
- Closing This Month
- My Opportunities
- New This Week
- Recently Viewed Opportunities



The **Recent Items** section shows the last items you have checked.



Opportunity

Printable View

National Bank of the Netherlands - Annual Seminar - December 2014



Show Feed

Click to add topics



« Back to List: Opportunities

[Opportunity Team \[0\]](#) | [Power Map Relationships \[1\]](#) | [Partners \[0\]](#) | [Contract Headers \[1\]](#) | [Opportunity Competitors \[0\]](#) | [Opportunity Sales Offers \[0\]](#) | [Cases \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Stage History \[4\]](#) | [Opportunity Field History \[5+\]](#)

Opportunity Detail

Edit

Clone

Sharing

Share with Another Hotel

Opportunity Naming Guidelines

Account Name
Client (if applicable)

The ASA folder number is automatically filled-in (upon synchronization)

Opportunity Owner



Laura VAN DER LIN (Cha

Estimated Opportunity revenue

Opportunity Name

National Bank of the Netherlands - Annual Seminar - December 2014

Amount EUR 8.800,00

ASA Folder Number

1550237

Stage 6 - Closed Won

Account Name

[NATIONAL BANK OF THE NETHERLANDS](#)

Probability (%) 100%

Final Client

[NATIONAL BANK OF THE NETHERLANDS](#)

Opportunity Close Date 24-7-2014

Offer Group

Meeting and Events Ad-hoc

New Business or Renewal

Reason for Loss

The probability value is defaulted according to Stage value

Offer Type

Convention

Sub-Reason

Estimated signature date of the deal

Offer Type

New Business

Offer Process

Hotel manages proposal

Proposal managed by the Hotel

Offer group :

- Annual Corpo and Distributors
- Meeting and events ad-hoc offer
- Leisure group ad-hoc offer

Opportunity chart evolves according to the Opportunity Stage value

Pre-loading

1. Qualify & Develop

2. Pre-Contract Solicitation

3. Build Proposal

4. Bid

5. Negotiate

6. Closed Won

7. Post-Contract Solicitation

Key Dates		Contract execution forecasted start & end dates		Date until the Offer is valid / Option date	
Start Date	12-12-2014	Limit Offer Date	1-9-2014	Deadline given by the client for submitting the proposal	
End Date	14-12-2014	Deadline For Submission	28-8-2014		
Validity Period (Months)	0	Client Decision Date	1-9-2014	Date on which the customer gives their decision	
Expected Volume		Refers to the validity period of the contract and can be entered manually			
Room Nights	80	Client Budget			
Average Price	EUR 110,00	Budget Per Person			
Pax	40				
Additional Information					
Destination(s)					
Opportunity Sources					
Accor Sales Source		Lead Source		If the Opportunity comes from a Lead managed in A.N.A.I.S., this field will be pre-populated	
		Primary Campaign Source			
System Information					
Created By		Laura VAN DER LIN, 23-7-2014 16:42		Last Modified By	
				Laura VAN DER LIN, 24-7-2014 15:55	

At the bottom of the Opportunity page, the information related to the Opportunity is displayed.

 Opportunity Team

Add

Display Access

Delete All

Action	Team Member	Member Role
Edit Del	Marie PAPON	Account Contributor
Edit Del	Hugo Abbou	Sales Support

Allows you to give Read/Write accesses to a Central Sales person that will help you work on the Opportunity

Allows you to give Read/Write accesses to a Central Sales person that will help you work on the Opportunity

Accor's sales people helping you work on the Opportunity

Contract Headers

Contract Header Name	Account	ASA Folder Number	Offer Group	Main Contact	Start Date	End Date	Currently Active	ASA Folder
CH-0015	Dow Chemicals	1448229	Leisure Group Ad-hoc Offer	Monica Montini	05/03/2013	29/05/2013	✓	Project

You can follow the ASA Folder status

You can go to the ASA Folder through the link

Contract Header
related to the
Opportunity
(created automatically and linked
to ASA Folder)

Opportunity Sales Offers

New Opportunity - Sales Offer Link

Action	Sales Offer Name	Start Date	End Date	Offer Duration (Days)	Type	Created Date	Owner
Del	Christmas Holidays Offer	23/12/2013	02/01/2014	11	Promotional	13/11/2013	Olivia

You can link the Opportunity to an existing Sales Offer

All Sales Offer
associated to the
Opportunity

You can create a **New Task** or a **New Event**

Open Activities

New Task

New Event

[Open Activities Help ?](#)

Action	Subject	Type	Name	Task	Assigned To	Due Date	Status	Priority
Edit Cls	Send e-mail	Email		✓	Catarina Keereman	02/02/2013	Not Started	High
Edit Cls	Shedule meeting	Other		✓	Catarina Keereman	18/04/2013	Not Started	Medium

All Open Activities related to the Opportunity

You can log a past call or **Send an email**

Activity History

Log A Call

Send an Email

View All

[Activity History Help ?](#)

Action	Subject	Type	Task	Due Date	Assigned To	Status	Priority
Edit Del	Send e-mail	Action	✓	14/04/2013	Catarina Keereman	Completed	Normal

All past / completed tasks and events related to the Opportunity

Notes & Attachments				
		New Note Attach File		Notes & Attachments Help
Action	Type	Title	Last Modified	Created By
Edit View Del	Attachment	DOW_hotel requirements for sales convention pptx	28/01/2013 10:18	Catarina Keereman
Edit Del	Note	Logistics information for sales convention	28/01/2013 10:16	Catarina Keereman

You can **Create a note** and **Attach a file**

All notes and attachments associated to the Opportunity

Stage History				
				Stage History Help
Stage	Amount	Probability (%)	Close Date	Last Modified
2 - Pre-Contract Solicitation	EUR 10 000,00	30 %	03/05/2013	Catarina Keereman , 28/01/2013 10:27
1 - Qualify & Develop	EUR 10 000,00	10 %	03/05/2013	Catarina Keereman , 25/01/2013 15:16
1 - Qualify & Develop	EUR 10 000,00	10 %	10/05/2013	Catarina Keereman , 25/01/2013 15:11

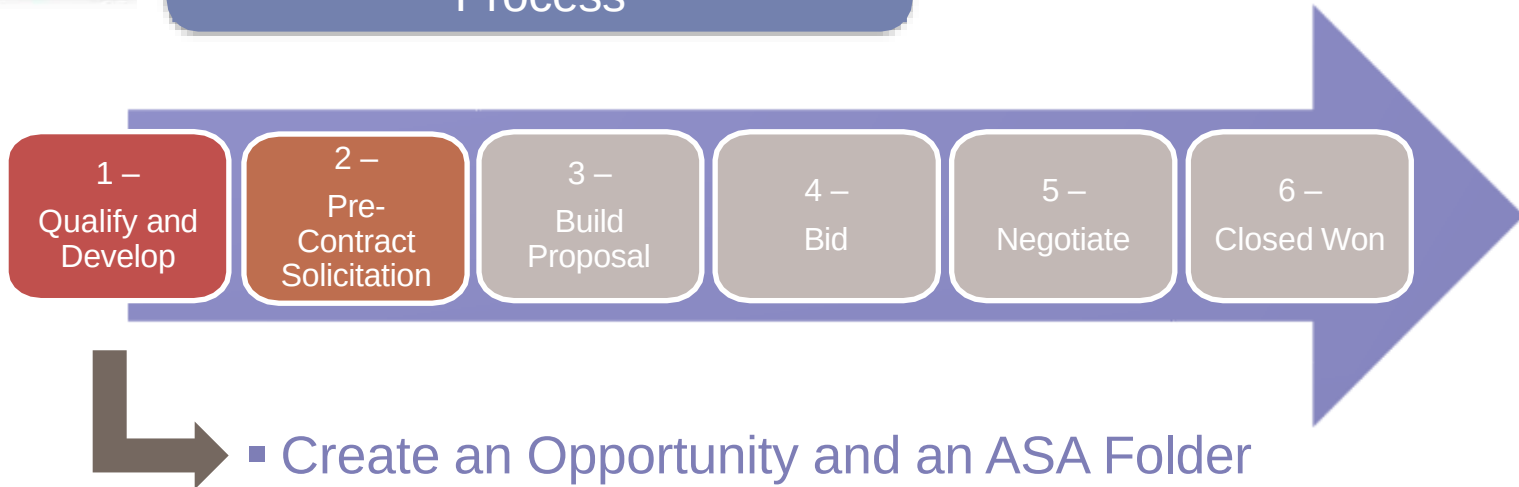
All changes / updates that have been made on the Opportunity stage

Opportunity Field History		
		Opportunity Field History Help
Date	User	Action
25/01/2013 15:16	Catarina Keereman	Changed Deadline For Submission to 19/04/2013 .
25/01/2013 15:11	Catarina Keereman	Created.

All changes/updates that have been made on the Opportunity



Manage an Opportunity through the whole Sales Process



1

**Best Practice****Contact****Opportunities as Main Contact****New Opportunity**

No records to display

From the Opportunity related list of the Contact page, click on **New Opportunity**

By default,

- the Opportunity is linked to the Contact as Main Contact and the Contact name is pre-populated
- the Account name to which the Contact is linked is pre-populated

OR

**Account****Opportunities****New Opportunity**

Action	Opportunity Name	Stage
Edit Del	Nomade Adventures-	1 - Qualify & Develop

From the Opportunity related list of the Account page, click on **New Opportunity**

By default, the Opportunity is linked to the Account and the Account name is pre-populated

OR

**Opportunity****Recent Opportunities****New**

From the Opportunity tab, click on **New**

Opportunity Name	Account Name	Account Code	Main Contact
Nomade Adventures-	Adventures		Keereman, Catarina
convention	Accenture CRM		Keereman, Catarina
Global accenture CRM Seminar	Accenture CRM		Keereman, Catarina EUR

以上内容仅为本文档的试下载部分，为可阅读页数的一半内容。如要下载或阅读全文，请访问：<https://d.book118.com/558057034001006027>