Opportunity Best Practices

- Ensure all Opportunities are assigned to individuals
- Move opportunities for future dates to the priority list
- Close lost opportunities to remove them from your active list

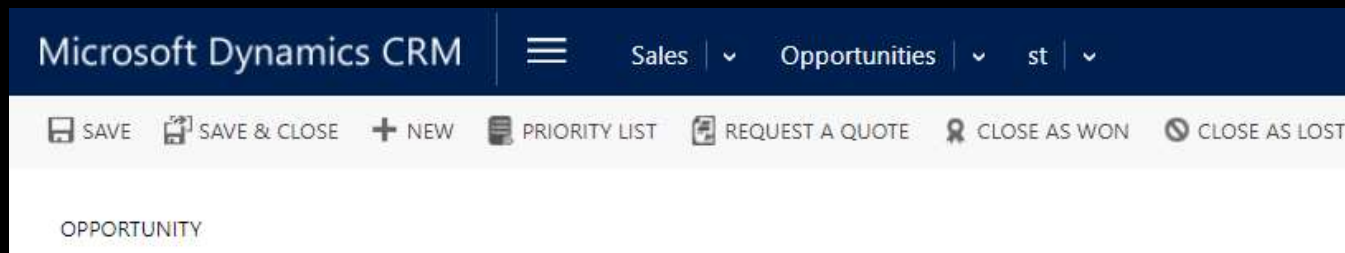PREMIERE
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Opportunity Assigning

- Records in CRM can be assigned to Users (people) or Teams (groups)
- By default when creating records those records are assigned to you
- Opportunities created from Web services are assigned to Teams
  - Inquiry forms on the website
  - Portal requests from Answer 365
- Recommend - all open opportunities be assigned to Users

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Opportunity Wait List

- Waitlist (or Priority List) intended for Opportunities that cannot be serviced now because they are too far in the future

- Move an opportunity to the waitlist by clicking the "Priority List" button in the ribbon of an open opportunity

- Opportunities on the wait list still exist, but are not part of your regular Open view

Opportunity Wait List (continued)

- Opportunities are moved off of the wait list when
  - You move them back – open the opportunity and click the "Priority List" again
  - They come off 30 days after they were moved to the priority list

Close Lost Opportunities

- Closing lost opportunities by clicking "Close as Lost"
- Removes them from active views
- Tracks lead source quality
- Enables better marketing automation

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