



**GLOBAL PMO UNIVERSITY**  
**NAVIGATING SALESFORCE FOR PROFESSIONALS**  





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**FACILITATOR GUIDE**  
**VERSION 3.0**

# NAVIGATING SALESFORCE FOR PROFESSIONALS

**Thank you** for facilitating the Navigating Salesforce for Professionals course. This guide outlines your responsibilities as a facilitator, the steps you should take to prepare for your role and a script to guide you when delivering the training. The guide is organized as follows:

<b>Overview of Class</b>	Background information about this course
<b>Course At-a-Glance</b>	A summary of the course activities, materials and timing
<b>Before Course Begins</b>	Tasks to complete before training starts
<b>Course Script</b>	A detailed script to follow when delivering the course
<b>After Course Concludes</b>	Tasks to complete once the course concludes

	Activity
	Group Discussion
	Utilize/Reference Flip Chart/White Board
	Assessment
	Homework
	Distribute Handout
	Play a Video
	Share a Story
	Role Play

	Poll Question
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**Note** – This Facilitator’s Guide shows a portion of this document and is not a complete guide.

## COURSE OVERVIEW

Navigating Salesforce provides Sales Professionals with processes for navigating and using Salesforce. After this training we provide a Quick Start Reference Guide that highlights the Sales Professionals "need to know" information to get started with the Salesforce CRM.

During this class, the facilitator walks participants through real-world scenarios in the Salesforce training database. At the end of the class, Sales Professionals log into the production environment to review their data and prepare to immediately start using the application when they leave class.

## COURSE AT-A-GLANCE

<b>Welcome</b> 10 Minutes	Introductions, Ice Breaker, Agenda	PowerPoint Deck
<b>Download Salesforce1</b> 3 Minutes		PowerPoint Deck
<b>Salesforce Benefits Salesforce Helps Execute Sales Management</b> 5 Minutes	Salesforce Helps Execute Sales Management	PowerPoint Deck
<b>Salesforce Terminology and Record Visibility Review</b> 5 Minutes		PowerPoint Deck
<b>Sales Process and Rules of Engagement</b> 3 Minutes		PowerPoint Deck
<b>Login and Home Page Information</b> 15 Minutes	Log In to Training Database, Sidebar, Tabs, Dashboard Refresh, Calendar,	PowerPoint Deck and Salesforce Application
<b>Search and Account Information</b> 5 Minutes		Salesforce Application
<b>Account Overview</b> 10 Minutes	Account is 360-degree view to review SPOC, Opportunity Summary, Contacts, Activities, etc.	Salesforce Application
<b>New Business: Creating and Editing Leads</b> 5 Minutes		PowerPoint Deck and Salesforce Application
<b>Activities: Creating and Editing Task and Events</b> 5 Minutes		PowerPoint Deck and Salesforce Application
<b>Adding Notes and Attachments</b> 10 Minutes		PowerPoint Deck and Salesforce Application

<b>Sharing and Converting Leads</b> 10 Minutes		PowerPoint Deck and Salesforce Application
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<b>Working Deals: Opportunities</b> 5 Minutes	Opportunity Fields, Opportunity Team, Contact Roles	PowerPoint Deck and Salesforce Application
<b>Log In to Production</b> 5 Minutes	Log In, Review of Opportunity Data	PowerPoint Deck and Salesforce Application
<b>Custom List Views</b> 5 Minutes	Custom List View Creation	Salesforce Application
<b>Chatter</b> 15 minutes	Review of Chatter in production environment	Salesforce Application and PowerPoint Exercises
<b>Salesforce 1 Configuration and Demo</b> 15 Minutes		PowerPoint Deck, Salesforce Application, and Salesforce1 App on Phones
<b>Professional Data Migration</b> 5 Minutes	Questions to Consider Before Migrating, and Migration Process	PowerPoint Deck
<b>Conclusion and Next Steps</b> 5 Minutes	Training Evaluation Help with Salesforce	PowerPoint Deck

## BEFORE COURSE BEGINS

### Training Materials Preparation

1. Confirm you have a copy for yourself:
  - Facilitator Guide
  - Instructor Deck (electronic copy for display)
  - Laptop and LCD for your use
  - Training Roster or Sign-In Sheet (usually completed with the help of the Change Management team)
2. Confirm you have for the participants:
  - Reports Quick Start Guide (handout)
  - Salesforce Quick Reference Card (laminated)
  - Data Standards Sheet (handout)
  - Training Evaluations
3. Confirm you have the following available for multiple classes to use:
  - Business Cards with Notes (1 copy for the entire time in the market)
4. Prepare flip chart with icebreaker questions and any other way you use it
5. Get markers for the flipcharts and for the white board (if needed)
6. Confirm you have spare laptops in case a participant does not bring a work laptop.

### Sandbox (Training Database) Preparation

1. Participants should log in as Test.Broker2@Company.com.crm.train# through Test.Broker32@Company.com.crm.train#. You will assign each participant a number to use in class. The password for all participants is 'TRAIN2014'.
2. Setup data in Salesforce sandbox (training database) Use Test.CSS1@Company.com.crm.train#
  - Put records that you plan to use in the 'Recent Items' section.



### **Additional TIPS to work into the script as appropriate:**

- When entering data in a field, Salesforce recognizes K, M, and B respectively as thousand, million, and billion. Save yourself some keystrokes!
- Since this is a web-based application, you can have multiple windows open with different Salesforce records. Great for multi-taskers!
- Since this is a web-based application, you can bookmark or add any page to your favorites. For example, if you are a SPOC, maybe you want to bookmark the Account record. Alternatively, you may want to bookmark a View or Report you use often.
- It's easy to communicate with other users about a particular deal or meeting by sending a link to the record. Copy the URL and email the link like you would any other favorite link and the recipient can click right into that record.
- When you are selecting a value in any pick list, you can type the first letter of the word to find all values that start with that letter. This can be useful when entering the country (United States) on leads or contacts.
- Alt + S opens and closes the 'Sidebar'.



(Group Discussion)



(Flipchart)

(Facilitator answers the questions and then participants answer the questions round robin.)

## SAY AND DO:

Before we dive in, let's review a few ground rules for the training today.

- Please keep multi-tasking to a minimum. At times I will ask you to close your laptops to ensure we are all focused and not working on other items or working ahead in the system. I know that I have a room full of competitive over-achievers. After all, that is why you are so good at what you do. Yet, I want to ensure we stay together as we work in Salesforce. Please don't work ahead.
- Also, please silence your cell phones. Even though the wonderful ring tones are great, they are distracting during class. If for any reason you need to take a call, please quietly leave the room before answering your phone.
- With that, this is a very informal and interactive class, so please feel free to ask questions at any time. I may ask for volunteers during class and, if no one volunteers, I will call on people. Remember, our goal is for you to have a solid understanding of how to use Salesforce once you leave this room. To garner that knowledge, you will want to participate!

We have a lot to cover so let's quickly review today's agenda.

**DO: Advance to the next slide.**



## NAVIGATING SALESFORCE

- Salesforce Introduction
- Login and the Home Page Information
- Search and Account Record Information
- Leads (New Business) - Creating, Sharing, and Converting
- Tasks, Events and Notes
- Opportunities (Deals) - Managing and Creating
- Custom List Views
- Salesforce1 - The Mobile App
- Professional Data Migration Support
- Conclusion and Next Steps



<p><b>(PowerPoint: Slide 2)</b></p>	<p>Today will be very interactive. For most of our session, you will be logged into our training environment where you will practice working in the system.</p> <p>Before we get you logged in, I will cover some details about the Salesforce application and review how it will facilitate the sales process and the Rules of Engagement.</p> <p>Once we get you logged into the training environment, we'll work through some group exercises. Toward the end of class, I will show you how to log in to our live Salesforce database and start reviewing your data so you can immediately start using the system. I will also show you how to use the Salesforce1 mobile app.</p> <p>This is a small group so feel free to ask questions as we go. There may be questions I put in the parking lot if I know it will be covered later or requires follow-up after this session.</p> <p><b>ASK:</b> Any questions? Let's get started.</p>
<p><b>Download Salesforce1</b></p>	<p><b>SAY:</b> I am starting the class with the download of the mobile app because I want to show you how to use this application at the end of class. Sometimes it takes a while to complete the download, so we'll take a few minutes to do this now. Then it will be ready for us to configure at the end of the class.</p> <p>Please go to the Play Store, App Store or location on your phone that allows you to download applications and games. Search for the</p>

	<p>Salesforce1 application and begin downloading it to your phone. It is a free application.</p> <p><b>(Note to the Facilitator</b> Help everyone download the application successfully.)</p> <p><b>SAY:</b> Please set your phone to the side as it continues to download the application. We'll get back to the phones later. In the meantime, let's move to why THE COMPANY selected Salesforce.</p>
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## Salesforce Benefits and Salesforce Helps Execute Sales Management



(PowerPoint: Slide 3)

**ASK:** Can I have a show of hands for who attended Town Hall? (Should be all participants.)

**SAY:** Excellent! That means you've already heard from your leadership team a little bit about Salesforce and why it was selected at THE COMPANY.

**DO:** Advance to the next slide.



**SAY:**

As a quick recap, Salesforce is a cloud-based application that THE COMPANY is using to manage the sales process. It is a CRM, which stands for Customer Relationship Management, which allows professionals to track their customer-focused activities and pipeline. It is the #1 sales application and is used by over 100,000 companies. Salesforce is also a very innovative company as demonstrated by its recognition by Forbes magazine. Salesforce is very customizable, so every company can make it match their business process, and it's important to note that our system was designed by end-users. Professionals just like yourself on the Occupier Brokerage team spent months helping to design the solution.

It syncs with Outlook, and we have an eLearning class that talks about this integration. Salesforce also has that mobile app that you downloaded earlier. It allows for single-sign on, which means you don't even have to enter any login credentials if you are on THE COMPANY

network. Lastly, a key benefit is that this a cloud-based system, which means it runs on the Internet. Therefore, you can access your data 24/7 from any computer or device with an Internet connection.

We know that much of your time working with Salesforce is likely to be on the mobile app. But there are some things that can only be done on the full website version; we want to be sure you are familiar with both ways you can use Salesforce.

**ASK:** Any questions so far?

**DO: Advance the slide. (This is an animated slide and will display without bullets under each term.)**

## Salesforce Terminology



(PowerPoint: Slide 4)

**TERMINOLOGY**  
Key Objects and Records in Salesforce

Leads	Accounts	Contacts	Opportunities
<ul style="list-style-type: none"> <li>Used to track prospect information and activities in the early stages of the deal.</li> </ul>	<ul style="list-style-type: none"> <li>Used to store information about an existing or potential client's organization and track activities of the account over time.</li> </ul>	<ul style="list-style-type: none"> <li>Used to store information about people associated with an account.</li> </ul>	<ul style="list-style-type: none"> <li>Used to manage sales pipeline, identify clients or deals that are in progress.</li> </ul>
<b>Visibility</b> <ul style="list-style-type: none"> <li>Individual (including team-CES)</li> <li>Local, regional and senior leadership</li> </ul>	<b>Visibility</b> <ul style="list-style-type: none"> <li>All</li> </ul>	<b>Visibility</b> <ul style="list-style-type: none"> <li>All</li> </ul>	<b>Visibility</b> <ul style="list-style-type: none"> <li>Individual (including team-CES)</li> <li>Local, regional and senior leadership</li> </ul>
Reports	Dashboards	Activities	Notes
<ul style="list-style-type: none"> <li>Used to provide a snapshot of data such as a report of opportunities created this week.</li> </ul>	<ul style="list-style-type: none"> <li>Used to display data in a visual format such as a gauge or a pie chart.</li> </ul>	<ul style="list-style-type: none"> <li>Activities are used to track meetings and tasks on accounts and items. It is a visual interface for accessing the calendar for a business relationship as defined in the ROL.</li> </ul>	<ul style="list-style-type: none"> <li>Notes are used to store information or messages for a client or prospect.</li> </ul>
<b>Visibility</b> <ul style="list-style-type: none"> <li>All (optional)</li> <li>Can be managed individually</li> </ul>	<b>Visibility</b> <ul style="list-style-type: none"> <li>All (optional)</li> <li>Can be managed individually</li> </ul>	<b>Visibility</b> <ul style="list-style-type: none"> <li>Individual (including team-CES)</li> <li>Local, regional and senior leadership</li> </ul>	<b>Visibility</b> <ul style="list-style-type: none"> <li>All (optional)</li> <li>Individual (including team-CES)</li> <li>Local, regional and senior leadership</li> </ul>

### SAY AND DO:

Understanding the basic terminology is a great way to get comfortable with Salesforce Let's go over this vocabulary together.

1. Leads –A lead is defined as a potential new client. During the data migration, your Professional's existing data from ACT, REA and Outlook will be loaded into Salesforce as leads. Leads in Salesforce are private to your Professional, people on your team or people with whom you decide to share the lead. Imagine that your Professional picked up a handful of business cards at a trade show. You or your Professional create a lead in Salesforce for each card.

	<p>Leads function like a private database or a “holding tank” until you qualify the lead and determine that it’s a real opportunity.</p> <ol style="list-style-type: none"><li data-bbox="479 325 1477 619"><p><b>2. Advance the slide to display the Accounts Definition box.</b> Accounts - An account, on the other hand, is an organization, business or company such as customers, competitors or partners with whom THE COMPANY currently has a relationship. For example, Bank of America would be an account. Account records are visible to all THE COMPANY Professionals with access to Salesforce.</p></li><li data-bbox="479 661 1477 955"><p><b>3. Advance the slide to display the Contacts Definition box.</b> Contacts - A contact is any individual associated with an account. So, while a lead is private to your Professional and your team, a contact is part of an active account and can be seen by sales Professionals at THE COMPANY with access to Salesforce. During the training today you will create a lead, convert it to a contact and attach that contact to an account.</p></li><li data-bbox="479 997 1477 1333"><p><b>4. Advance the slide to display the Opportunities Definition box.</b> Opportunities - An opportunity refers to a pursuit or an in-progress deal. During data migration, the current pipeline information will be loaded into opportunities, if your Professional decides to opt-in. <b>(Note to the Facilitator:</b> If you think that introducing all of these terms at one time is information-overload, you may delete the Reports and Dashboard information from this slide. Then you can define these terms later in the training.)</p></li><li data-bbox="479 1375 1477 1627"><p><b>5. Advance the slide to display the Reports/Dashboards Definition boxes.</b> Reports and Dashboards – These analytic tools allow you to query your Professional’s information and your team’s information to get real-time insight into business dealings. Dashboards are visual representations of reports showing an overview of data.</p></li><li data-bbox="479 1669 1477 1879"><p><b>6. Advance the slide to display Activities Definition boxes.</b> Activities – Tasks and events allow you to track the important to-dos and interactions your Professional has with leads, accounts, contacts and even against opportunities. As the Rules of Engagement states, an activity is valuable information that may</p></li></ol>
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advance THE COMPANY' s position on a lead or opportunity with an existing or prospective client. For an on-going client service, activity is further defined as information related to building and maintaining THE COMPANY' s client relationship.

## 7. Advance the slide to display the Notes Definition boxes.

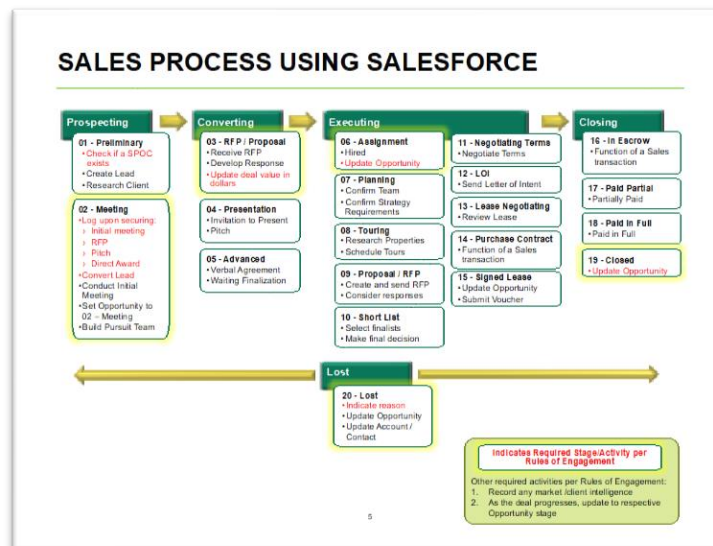
Notes – Notes, both private and public, are used to document additional information in regards to leads, accounts, contacts and opportunities. Tracking all of this information in Salesforce gives a real-time, in-depth and historical picture of your business dealings, which is accessible 24/7.

### Sales Process and Rules of Engagement



(PowerPoint: Slide 5)

**DO: Advance the slide.**



**ASK:** Can I have a show of hands to see who recently completed Rules of Engagement training? (Should be everyone in the room.)

Excellent! This slide should look familiar then as it outlines the sales process and a few things that are required per the Rules of Engagement as you move through the sales stages. Today we are going to show you how to use Salesforce to facilitate that process. I think what you will find that is that there is really nothing new that you will need to do in Salesforce. The tool will simply streamline what you are already doing today as part of your sales process.

	<p>The process begins with Prospecting. Per the Rules of Engagement, you need to confirm whether THE COMPANY is already doing business with the account and if so, if there is a SPOC associated to the account.</p> <p>If there is a SPOC, the process is that you reach out to your local management, not the actual SPOC, to help you determine if you can pursue your lead. The SPOC process is now being managed in Salesforce</p> <p>Once you receive confirmation from the local management, you can pursue the deal. As soon as you schedule an Initial Meeting or if you get included on a RFP, pitch, or direct award, you must enter that meeting in Salesforce. Per the Rules of Engagement, that deal information also needs to be entered in Salesforce and tracked as an opportunity.</p> <p>As you move through the sales cycle, you will need to keep the opportunity up-to-date. With Salesforce, as soon as you update your opportunity the changes are automatically updated in the management team’s pipeline reports. This means no more fire drills around pipeline reporting as everyone always has the latest and greatest information. That is good news!</p> <p>Lastly, when the deal is Closed or Lost, add a few additional pieces of data to report what you sold or provide more details about why we lost the deal.</p> <p>As you can see, the requirements for using Salesforce throughout the sales process are very minimal.</p> <p><b>ASK:</b> Are there any questions regarding the Sales Process or the Rules of Engagement?</p>
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## Login and Home Page Information



(PowerPoint: Slide 6)



### SAY AND DO:

1. Advance to the next slide.



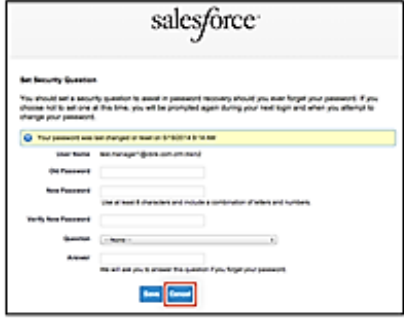
2. In training today, we use a test Salesforce environment. Please open a web browser to navigate to <https://test.salesforce.com>. Let's count-off around the room to assign login credentials. I am user number one, so we'll start with number two.
3. **Help participants number off around the room so that everyone gets a number.**
4. **Switch to a web browser.**
5. **Navigate to <https://test.salesforce.com>.**
6. **Participants use [Test.Broker2@Company.com.crm.train#](#) through [Test.Broker32@Company.com.crm.train1#](#) as logins for this class. The password for all participants is 'TRAIN2014'. Replace the # in the login with the appropriate sandbox #.**
7. **Log in using '[Test.Broker@Company.com.crm.train#](#)', with the password of 'TRAIN2014'. The facilitator generally uses the #1 log in.**
8. **Help all participants login using 'TRAIN2014' as their password.**

(PowerPoint:  
Slide 7)

9. Advance to the next slide.

**SALESFORCE TRAINING LOGIN**

- When prompted to change your password, click 'Cancel'.
- Maintaining your password is key to helping you with any login issues you may have.



CBRE salesforce

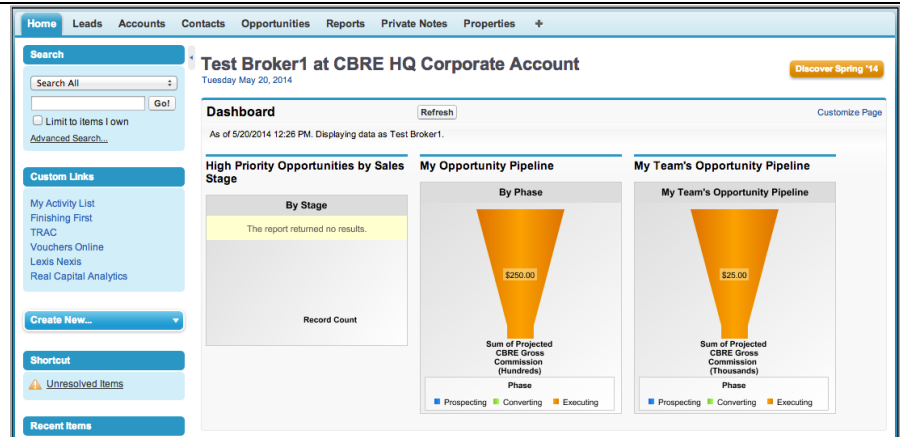
10. You will be prompted to change your password. **Please do not change it!** Simply press the 'Cancel' button. Maintaining the 'TRAIN2014' password allows us to help you if you happen to get logged out and are unable to log back in.

11. **ASK:** Have we all successfully logged in?

**POSSIBLE ANSWERS:** No, Yes

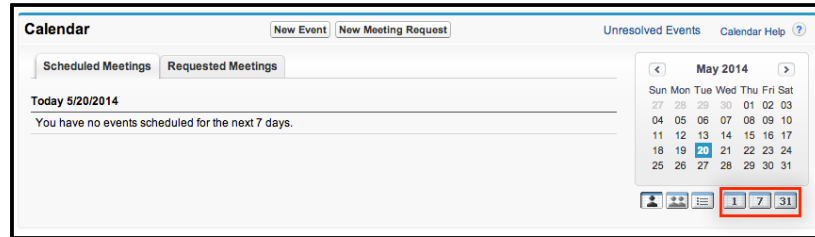
**(Note to the Facilitator:** Ensure all students have successfully logged in before moving forward.)

12. Once you've successfully logged in to Salesforce the first place you land is the Home tab. This is a snapshot of your world within Salesforce. We'll go through this page in just a second.

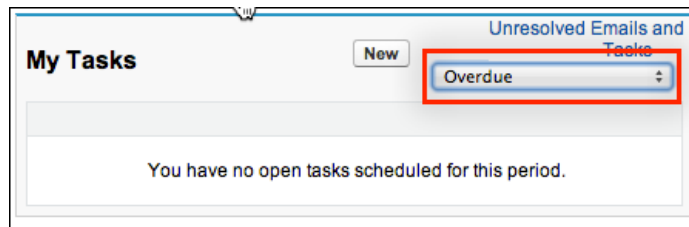


13. If your page looks different from mine, it could be because your 'Sidebar' is collapsed or expanded while mine is not. You can collapse or expand it by clicking this arrow. You will want to make sure it is open so you can access the Search field.
14. **Click the 'Sidebar Arrow' a couple of times to collapse and expand the 'Sidebar'.**
15. Above the tabs is the header, which appears no matter where you navigate in Salesforce. The tab bar displays all of the modules in Salesforce. They are very similar to a menu in other applications. Home, Leads, Accounts, Contacts, etc. Clicking on a tab will take you directly to that module of data in Salesforce.
16. Let's focus first on the 'Home' tab. It displays useful everyday information for your review. On the 'Home' tab, you will find a 'Dashboard' widget and your 'Calendar'. The 'Dashboard' is a visual representation of several reports that have been created to help you manage your pipeline. We are not going to have time to cover Reports and Dashboards today, but soon there will be an eLearning course offered on this topic. The key takeaway today is that the 'Dashboard' is an easy to slice and dice your data and report on it as needed.
17. **Hover over the 'Refresh' button.** Dashboards show data as of the last refresh. Therefore, press the 'Refresh' button to update the data displayed.

18. **Scroll down to the 'Calendar widget'.** Next is the 'Calendar'. Clicking the buttons below the 'Calendar' view will launch different views you can use to manage your tasks and events. The 'Calendar' can sync with Outlook if you want it to.

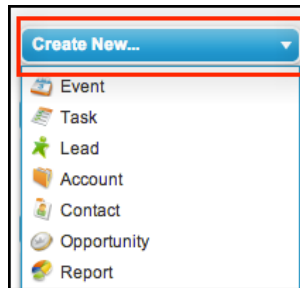


19. I find the daily view useful - it shows my daily tasks and events in one view. To see this **click the '1' button below the 'Calendar'.**
20. Adjust which tasks display in the Task pane by dropping down from the list. Maybe the 'Today + Overdue' works better for your task management style?



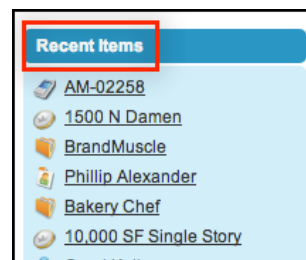
21. Moving on to the 'Sidebar'. The 'Sidebar' will always display on the left-hand side of the screen.
22. At the top of the 'Sidebar' is Search. We have an exercise coming up using this feature in just a bit. It's a very intuitive search bar that you can use to search for a particular type of record or you can search across the entire database, including your meeting notes.
23. Next are the custom links that are shortcuts to other systems you use. They are probably familiar to most of you. This includes a short cut to get to your 'Activity List' in Salesforce. We'll talk more about activities in this training.

24. Click the 'Create New' dropdown to display the list of records available to create from this menu.



25. The 'Create New' dropdown allows you to create new records of any kind in Salesforce including Leads, Accounts, Contacts, even Tasks and Events.

26. Finally, the 'Recent Items' section is an efficient navigation tool. By default, Salesforce lists the last 10 records you have viewed in the application. It assumes that if you looked at it recently, you may want to check that record out again in the near future. You will find this helpful when working on multiple records throughout a given day.



27. **ASK:** We have finished the Home page and the overall navigation in Salesforce. Does anyone have any questions about the layout or navigating in Salesforce?

## Search and Account Record Information

### ASK:

It's time to get your hands on the keyboard and dive in with some exercises.

Let's say you're at a fundraising event and you meet a person of interest whom you think could be a good business lead. What is the first thing you have to do when it comes to pursuing leads and entering that information in Salesforce?

**POSSIBLE ANSWERS:** Create a lead, search for the company, search for the person's name

**SAY AND DO:**

We will definitely want to review Salesforce for this information to determine how to move forward. Here is the Exercise Packet if you want to follow along.



*(Distribute the Exercise Packet)*



*(PowerPoint: Slide 8)*

1. **Distribute the Exercise Packet.**
2. **Show the following PowerPoint slide.**

**EXERCISE #1 – SEARCH AND ACCOUNT RECORD FORMAT**

Your Professional or you met Chris Edwards at a United Way fundraising event and learned Chris works for Camcom Investments. You'd like to develop this relationship because Chris is the Director of Acquisitions and is responsible for all of their office real estate decisions. Following the Rules of Engagement, review Salesforce for existing Account information.

1. Review the Account details and related records.
  - a. How many employees are there?
  - b. Are there any related opportunities?
    - ❖ **Note:** Click the 'Link to Opportunity Information' to be sure.
  - c. Is there a SPOC?
  - d. What is the name of the contact associated with this record?
  - e. What is his direct line?
3. What record is now at the top of 'Recent Items' in the Sidebar? Why?
4. Can the Professional pursue this deal? Why?

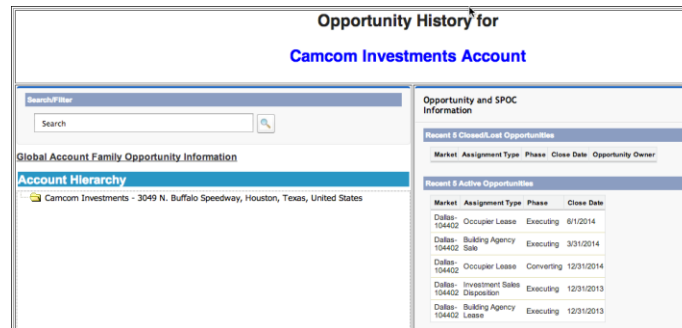
CBRE salesforce

3. Per the Rules of Engagement, we need to see if Camcom Investments is already in Salesforce and if so, if there is a SPOC or any active opportunities. Together let's search for just 'Camcom'.
4. **ASK:** What did we find?  
**POSSIBLE ANSWERS:** An Account, a list of Contacts, Chris Edwards
5. Reviewing the results, we found one Account and a list of Contact records.
6. **ASK:** What do we do next?  
**POSSIBLE ANSWERS:** Search again, click on 'Camcom Investments' Account record



	<ol style="list-style-type: none"><li>7. If we <b>click on 'Camcom Investments'</b> that will take us to the Account record.</li><li>8. <b>ASK:</b> What is an account? What do you see? What information seems important? <b>POSSIBLE ANSWERS:</b> It's a record of a company/business, the address, phone number, related records</li><li>9. <b>Scroll through the Camcom Investments Account record.</b></li><li>10. <b>ASK:</b> Is there a SPOC? What type of SPOC?</li><li>11. <b>ASK:</b> How many Contacts do you see? <b>POSSIBLE ANSWERS:</b> 5 or 7.</li><li>12. <b>Click on the 'Show 2 More'</b> link. All related lists default to display five records, even if there are more. Clicking the link displays more records.</li><li>12. <b>ASK:</b> What else do you see? <b>POSSIBLE ANSWERS:</b> We don't have any opportunities in the Opportunities related list. There are four Activities and no private Notes.</li><li>13. The visibility of activities and private notes related to contacts and accounts depend on whether you own the record, are on the record owner's team, or if the record owner has shared the record with you directly. All activities are private to the owner and his/her team except for the activities labeled 'Public-Client Intelligence'. Private notes are only visible to their owners and the owners' team.</li><li>14. <b>ASK:</b> How many opportunities do you see? <b>POSSIBLE ANSWERS:</b> none</li><li>15. <b>SAY:</b> Opportunities are only visible to their owners, and the record owner's team. This is really important point. The Rules of Engagement say in addition to checking for a SPOC, we are supposed to check to see if there are any active opportunities.</li></ol>
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16. **ASK:** If we can't see other people's opportunities, how are we supposed to know if there's any opportunities with that account?
17. Since opportunities are only visible to owners and team members, there is a special link for everyone to see if that account has any Opportunity history across all of THE COMPANY. (Note: I call it the "I Don't Know What I Don't Know" link.)
18. **Click the 'Link to Opportunity Information**



19. This link takes you to a page that offers high-level information on past and current deals we've engaged in with the Account. If you see any activity, you should consult with the LMA leadership before pursuing a deal. In addition to checking for a SPOC, clicking this link is important to do prior to starting any pursuit.
20. **ASK:** How can we get to Chris' record?  
**POSSIBLE ANSWERS:** Click his name in the list of contacts, Search for Chris Edwards. The easiest way from Camcom to Chris's record is to **navigate to the contact related list and click into his record.**
21. **ASK:** So, can you pursue Chris Edwards and Camcom Investments according to what you found in Salesforce?  
**POSSIBLE ANSWERS:** Have to check with the SPOC and LMA leadership

## AFTER COURSE CONCLUDES

- Collect training roster (done by Change Management or Training Lead)
- Collect training evaluations (done by Change Management or Training Lead send to Judy)
- Clean up room
- Send follow up email – if necessary