

Opportunity Management

Close more deals with opportunity management

By: Akansha Srivastava



Agenda

1

Overview

Brief product overview about opportunity management module in LeadSquared

2

Problems Solved

Highlights the key problems which are solved with the introduction of opportunities

3

Product Specification

Introduction to power packed features of opportunity management

4

Customer Pipeline

Glimpses of our customer pipeline as on today from different industries

5

Use cases pertaining to different industries

List of use cases opportunities cater to. Most frequent asks by our existing customers from a long, long time

6

Implementation Details

Overview on opportunity setup with features like duplicate detection, smart views, automations, so on.

7

Roadmap for JAS

Apart from initial fire fighting to make product a success, a brief overview on the roadmap for this quarter.

8

FAQs

List of questions asked over the period of time when opportunities was getting developed and now as well

Overview

Opportunity Management

Opportunity management in LeadSquared helps in capturing and tracking all opportunities easily and efficiently in a systematic way without any work around. Not only that, it also helps in segregating these opportunities into various types / pipelines.

Pipelines / Types

Each opportunity type represents a separate pipeline, where admins are allowed to configure different

- Opportunity fields
- Opportunity Form
- Stages
- Duplicate Detection Rules, Vcard Customization, Smart Views, Automation, etc.

In short, every opportunity type can be all together a different entity when compared with any other opportunity type



Duplicate Leads Problem

What was it?

Same contact is interested in different products from the same company. For example:

- Same student wants to enrol for 3 different courses from the same institution
- Same student wants to enquire with 3 different campuses of the same university for the same course
- Same contact wants to buy Car Insurance, Bike Insurance & Term Insurance all from same insurance provider



Implementation Solutions Before Opportunities

2 ways to implement above scenarios in LSQ:

- Add each of the enquiry for different product as an activity against the contact
- Remove uniqueness from phone & email fields & create new contact with each request. Later using automation if exists card, check if similar enquiry exists, if yes then merge it

Both the approaches just act as a workaround and are definitely not scalable solution as the customer grows in LeadSquared.

Duplicate Leads Problem

Acko General Insurance - Same contact wanting different types of insurances



#1 Car Comprehensive Insurance

Raj has purchased a brand-new Honda City and is looking to buy comprehensive insurance for it



#2 Car Third Party Insurance

Polo was his previous car, which he has now given to his wife and is looking for just 3rd party insurance



Raj Sharma



#3 OLA Insurance

He also wants to insurance all OLA rides taken by him and his family members



#4 Bike Insurance

Raj also owns Bajaj Passion Pro bike and renews its insurance every year

Problems solved by Opportunity Management



Solves the problem of **duplicate contacts / opportunities**



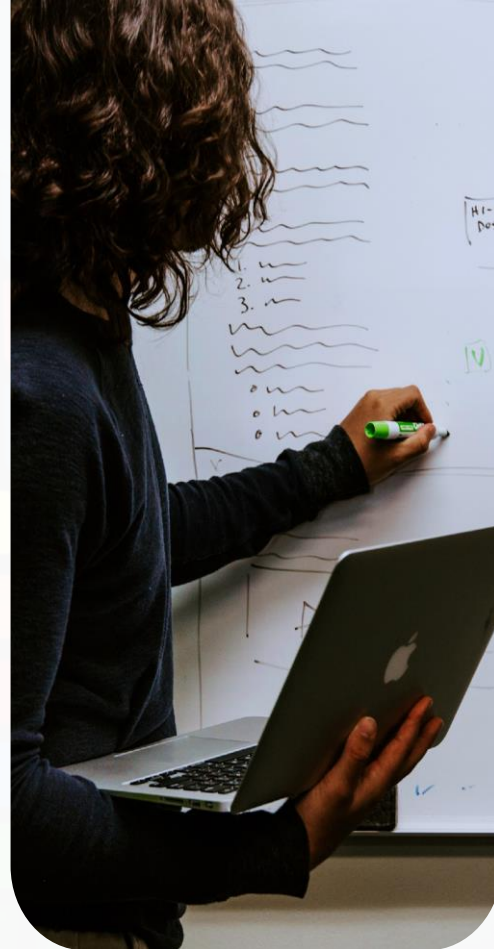
Provides an ability for **multiple sales reps to work on the same contact for different opportunities simultaneously**



Helps in managing **multiple pipelines** using different opportunity types (different sales processes)



Define **separate sales process for each pipeline**



Problems solved by Opportunity Management



Easy of implementation without any workarounds



Ability to **map multiple sales processes in single tenants** with help of opportunity types and their stages



Contact accessibility based on product lines



Single place of reference for:

- consolidated list of activities & tasks for a particular contact
- Closed & ongoing opportunities with the same contact



Product Specifications

1 of 2

Pipelines / Product Based Sales Process

Opportunity types provides the ability to map multiple pipelines for various products / territories in a single tenant, with different stages and separate sales process for each.

Opportunity Distribution

Easily assign opportunities to the right sales rep or team in a round robin manner based on your criteria

Opportunity Capture

Opportunities have all integrations required to support capture from any source

Agent Popup

Dynamic forms configured for opportunities can be used in agent popup. Followed by strong processes setup for upsell / cross.

Duplicate Detection

The secret sauce of the opportunity management in LeadSquared. Helps you setup N dedup rules for any of the pipeline

Activities, Tasks & Notes

Activities, tasks & notes are no more tightly coupled with lead. Opportunities have their own activities, tasks & notes.

Import / Export Opportunities

Import and export functionalities for opportunities is supported from day one.

Forms & Processes

Dynamic forms now support Contact, Opportunities, Activities & Tasks all in a single form. Along with various new workareas of opportunities.

Smart Views

Smart views now has a new tab type as "Opportunity". Also activities & tasks tabs show all activities & tasks associated with opportunities as well.

Product Specifications

2 of 2

Permissions & Accesses

Keeping existing permissions intact. New enhancements have been made in default access & permission templates to accommodate opportunity use cases.

Sales Automation

New triggers and actions have been introduced in automation to automate a streamlined sales process for each opportunity pipeline

Portal

Portals have been extended for opportunity entity as well with the help of dynamic forms

Customer Pipeline

Opportunity Management



Education

- iZenBridge
- Laurus College
- Kenneth Shuler School of Cosmetology
- Crave Beauty Academy
- **+ 4 more**

- ABSLI
- PAYTM Insurance
- TVS Credit
- HDFC Life
- AIA
- **+ 13 more**



BFSI



Others

- 4chaki
- Prione
- Hoffman
- Symphony Ltd
- **+ many more**

Use Cases

Industry: Education

Multiple Opportunities by Same Student

- Same student enquiries for multiple courses with same institution and hence each of the enquiry should be a treated as new opportunity
- Same student shows interest in multiple campuses for same course with 1 institution. Again each of the enquiry is a new opportunity
- Parent wants their both children to be admitted with the same intuition in different classes. For intuition both admissions are separate opportunities

Upsell / Cross Sell Opportunities

- Based on the courses enrolled by the learner, & time spent on these courses upsell & renewal opportunities are generated
- Call center rep can pitch for other relevant courses or a package containing multiple courses at a discount rate to the prospect
- Call center rep should be able to view all closed / on-going opportunities through agent popup, to assist the prospect quickly (inbound call scenario)

- iZenBridge
- Vedantu
- upGrad
- Toppr
- Amity University
- Asher College
- Podar School
- Unacademy
- **+ many more**

Use Cases

Industry: Finance

Multiple Opportunities by Same Contact

- Same prospect can go for multiple loans from same bank for different needs like:
 - Personal Loan, Professional Loan & Business Loan
- Same prospect can go for different insurance types from same organization like:
 - Car Insurance, Bike Insurance & Ola Insurance

Upsell / Cross Sell Opportunities

- Pitch for other products over inbound / outbound calls
 - Personal Loan, Professional Loan & Business Loan
- System generates opportunities based on upsell / renewal activities (V2 APIs integration with customer's internal system) posted on contact / opportunity level

- Poonawalla Finance
- Paytm Insurance
- ABSLI
- Bharti AXA
- Moneywise
- Acko General Insurance
- Bank On Us
- **+ many more**

Use Cases

Industry: All (having multiple products)

- Each opportunity type having its own life cycle with different field-sets, forms, stages, sales process and team
- Opportunities to be assigned to sales rep from appropriate vertical / team like renewal team, upsell team, inbound calling team, etc.
- Activities, Tasks & Notes to be associated with the opportunities directly
 - As the entire sales is getting driven on opportunities
- Teams to work on list of tasks associated with opportunities instead of contacts
- Automatically create task
 - Based on new opportunity
 - Based on activity done on opportunity
 - Based on the task mark completed, so on.



Use Cases

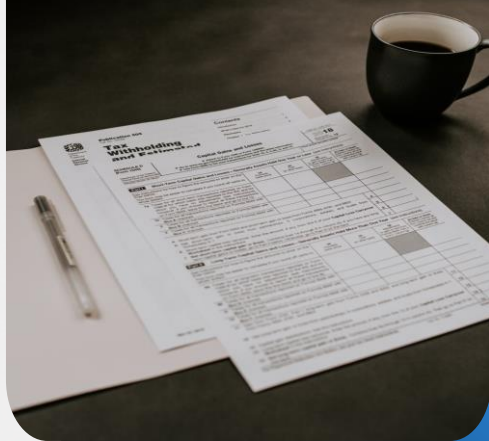
Industry: All (having multiple products)

Forms & Processes

- Dynamic forms to easily create contact, opportunity, activity & task using a single form
- Define associations of Activity/Task to Contact /Opportunity.
 - E.g.: CIBIL Score Activity can be linked to the Contact or to a Loan Opportunity based on the tenant process
- Rules Engine, File Uploads, Payments, Multi Step Forms and other features of Forms have been updated for Opportunity use cases
 - Payments can now be mapped to the Contact or an Opportunity

Portals

- Different Loan types (Personal, Professional, Business) can have different workflows for same contact
- Show different Forms based on contact preference using Process while creating Opportunity
- Forms in Landing Pages support Opportunities.
 - Create information rich opportunities from contacts directly
 - Update existing opportunities with context based on contact actions, like after successful document upload or payment made



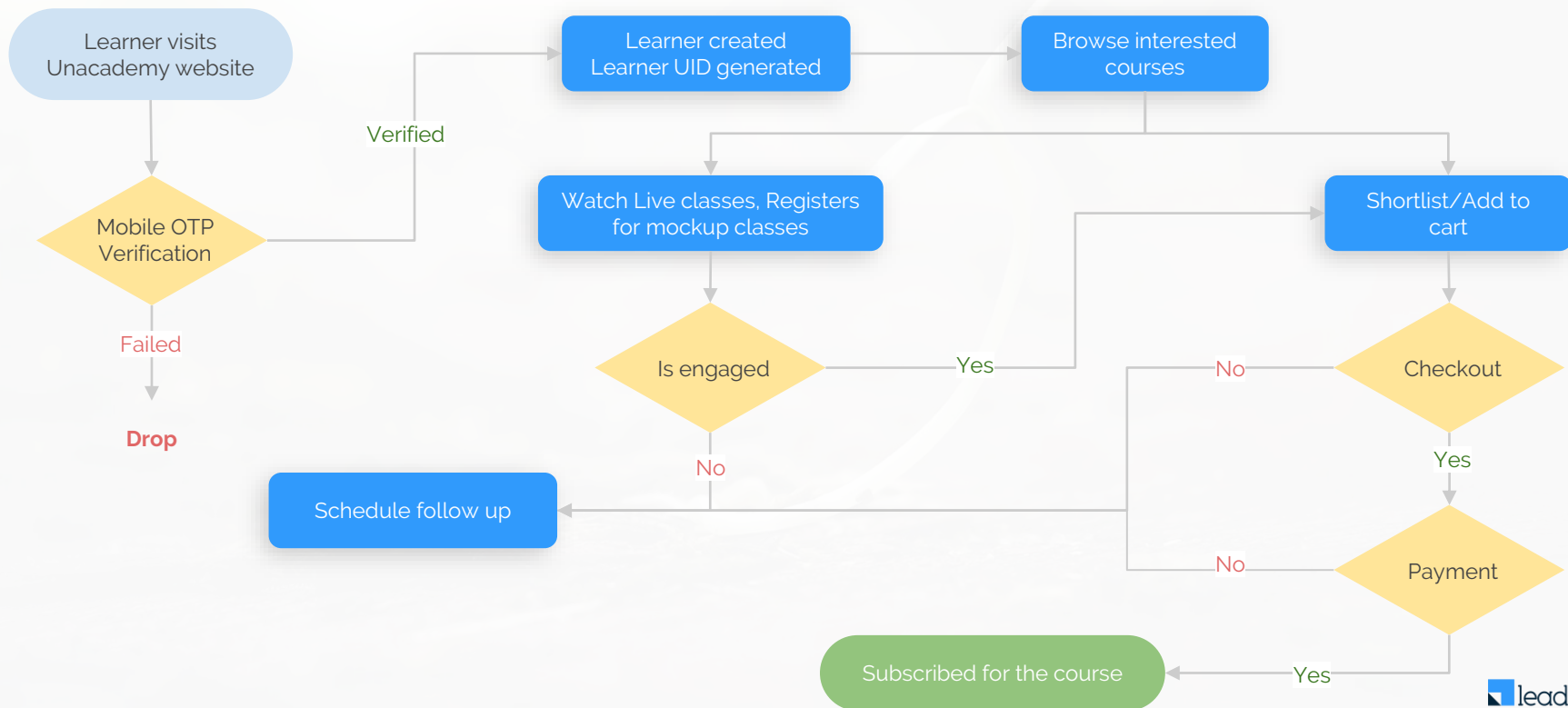


Unacademy

Mock-up implementation using Opportunity Management

Unacademy

Sales Process - Happy flow for single enquiry



LSQ - Opportunity Lifecycle

Overview

How are opportunities created:

- Unacademy's sync job
- Job runs each 1 hr
- Contacts created
- Opportunities created
- Using V2 APIs.

Opportunity Creation

Opportunity activities

- Actions done by student are added on opportunities
- Again using V2 APIs

Adding Activity

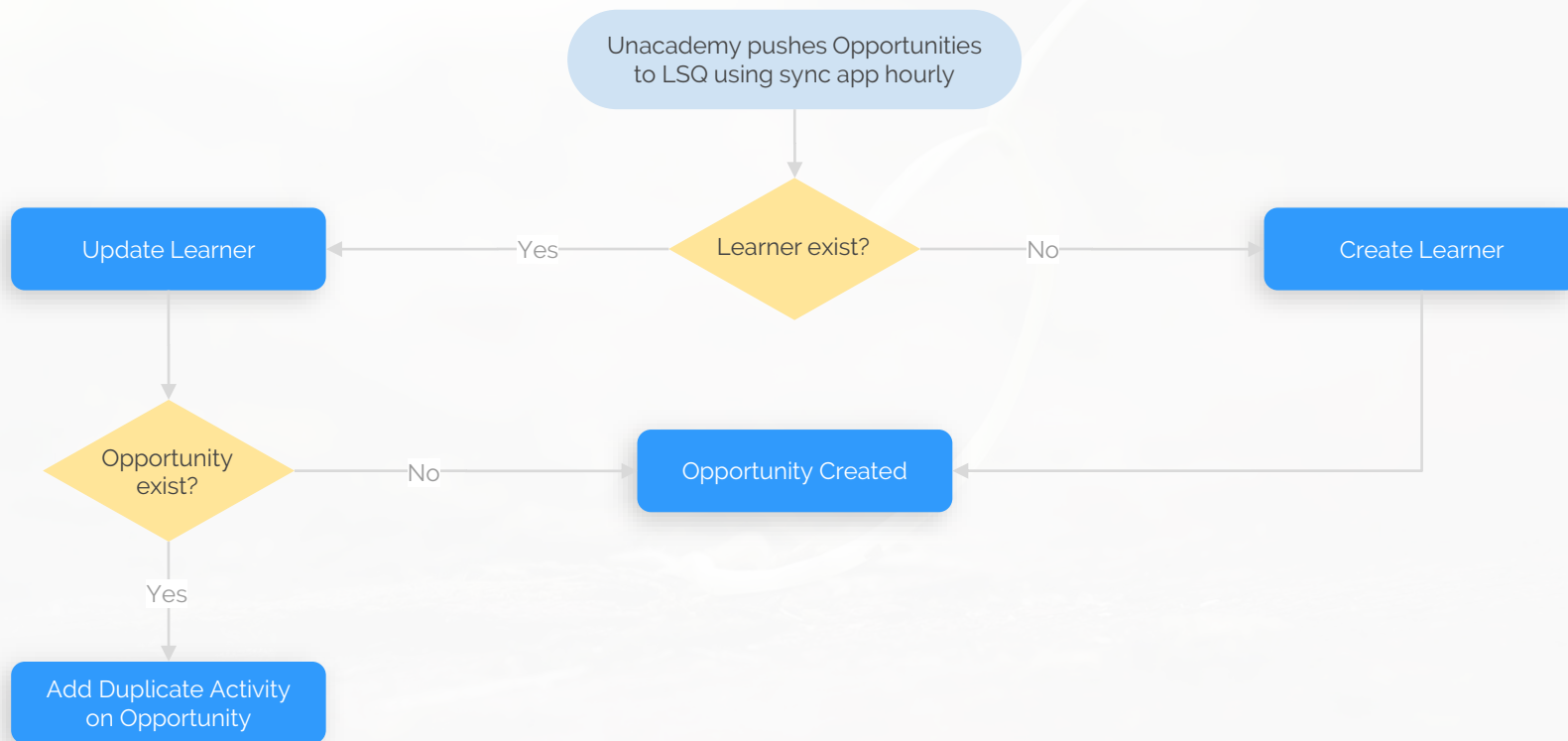
Sales Reps & LSQ

- Tasks are created for reps using automations
- Mostly on the basis on activities added

Sales Rep

LSQ - Opportunity Lifecycle

Step 1: Opportunity Creation



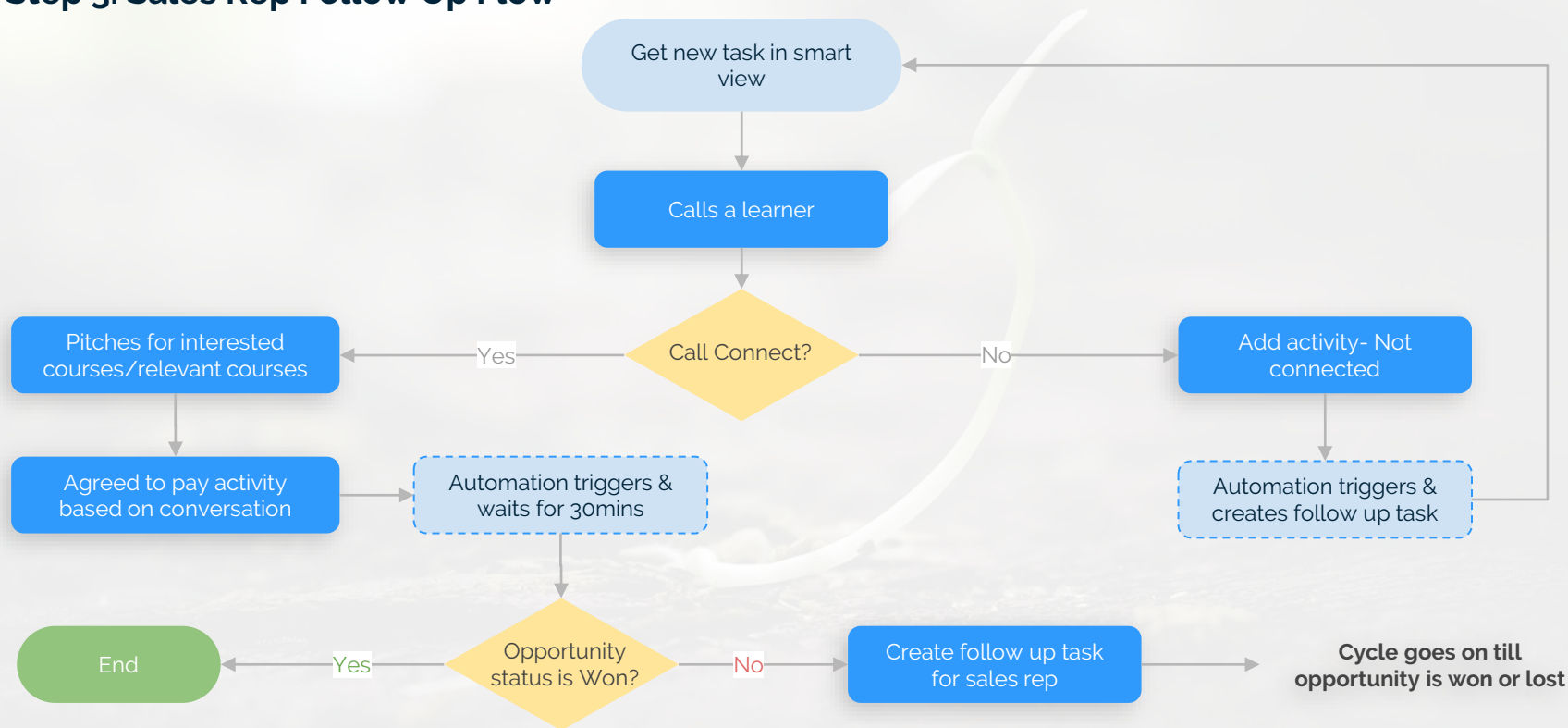
LSQ - Opportunity Lifecycle

Step 2: Adding Activity (Payment statuses & abandon cart) to Opportunity



LSQ - Opportunity lifecycle

Step 3: Sales Rep Follow Up Flow





Implementation Details

Details on how setup & work with opportunities




Opportunity Setup

How admins can configure opportunities in their accounts

Opportunity Setup in LSQ

Opportunity Type Configurations


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My Password

My Email Signature

My Report Subscriptions

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Company Profile

Custom Logo


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Billing and Usage

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Utkarsh Rai
utkarsh@mailinator.com
Administrator

Personal Details

First Name

Utkarsh

Last Name

Rai

Email Address

utkarsh@mailinator.com

Role

Administrator

Designation

-

Manager

-

Old Team

-

Department

-

Sales Regions

-

Skills

-

Agent Phone Numbers ⓘ

+91-9967821412

Phone (Main)

+91-9967821413

Phone (Mobile)


-

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Opportunity Setup in LSQ

Duplicate Detection Rules


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Data Protection & Privacy

Analytics

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My Leaves

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Company Profile

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
Request History

Billing and Usage

Billing and Usage

My Profile ?

Manage your personal profile



Utkarsh Rai

utkarsh@mailinator.com

Administrator

Personal Details

First Name

Utkarsh

Last Name

Rai

Email Address

utkarsh@mailinator.com

Role

Administrator

Designation

-

Manager

-

Old Team

-

Department

-

Sales Regions

-

Skills

-

Agent Phone Numbers ?

+91-9967821412

Phone (Main)

+91-9967821413

Phone (Mobile)

-

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Opportunity Setup in LSQ

Permission Templates

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Data Protection & Privacy

Analytics

Users and Permissions

Users

Sales Groups

Roles

Teams

Permission Templates

Lead Assignment Quota

Restriction using IP Whitelisting

User Availability

User Check-in

Work Day Templates

Holiday Calendar

Leave Tracker

Support

Permission Templates ?

Manage Permission Templates

Search Template

Create

Name	Description	Assigned To	Modified By	ModifiedOn	Actions
Renewal Team		Not assigned yet	Utkarsh Rai	07/16/20 02:13 AM	⚙
Marketing User Permissions	Permissions set for mark...	1 Role	System	07/10/20 07:00 PM	⚙
Sales Manager Permissions	Permissions set for sale...	1 Role	System	07/10/20 07:00 PM	⚙
Sales User Permissions	Permissions set for sale...	1 Role	System	07/10/20 07:00 PM	⚙

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Opportunity Setup in LSQ

Smart Views

🇬🇧

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Opportunities (BETA)	My Report Subscriptions
Mobile App	My Leaves
Lead Tracking	Organization Settings
Lead Prioritization	Company Profile
Email Settings	Custom Logo
Rules and Notifications	Request History
API and Webhooks	Billing and Usage
Data Protection & Privacy	Billing and Usage
Analytics	

My Profile

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Utkarsh Rai
 utkarsh@mailinator.com
 Administrator

Personal Details


First Name	Utkarsh
Last Name	Rai
Email Address	utkarsh@mailinator.com
Role	Administrator
Designation	-
Manager	-
Old Team	-
Department	-
Sales Regions	-
Skills	-
Agent Phone Numbers	+91-9967821412
Phone (Main)	+91-9967821413
Phone (Mobile)	-

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Opportunity Setup in LSQ

Automations


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Automation

Type	All	Status	Published	Modified By	Any	Modified On	All Time	
Name	Type	Unique Record Count	Trigger Count	Last Published On	Status	Modified On	Modified By	Actions
Update Paid Subscription Count	Opportunity Updated	2	2	07/12/20	Published	07/12/20	Utkarsh Rai	
Add follow up task on new opportunities	Opportunity Added	3	3	07/12/20	Published	07/12/20	Utkarsh Rai	
Update Source for duplicate enquiry	Learner Updated	0	0	07/12/20	Published	07/12/20	Utkarsh Rai	
Create Opportunity	Learner Created	2	2	07/12/20	Published	07/12/20	Utkarsh Rai	

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1

+ Create Automation


Related Settings

- Manage Lists
- Manage Custom Fields
- Manage Custom Activities
- Manage Learner Assignment Quota
- Automation Failure Report

[object Object]

We're Online!

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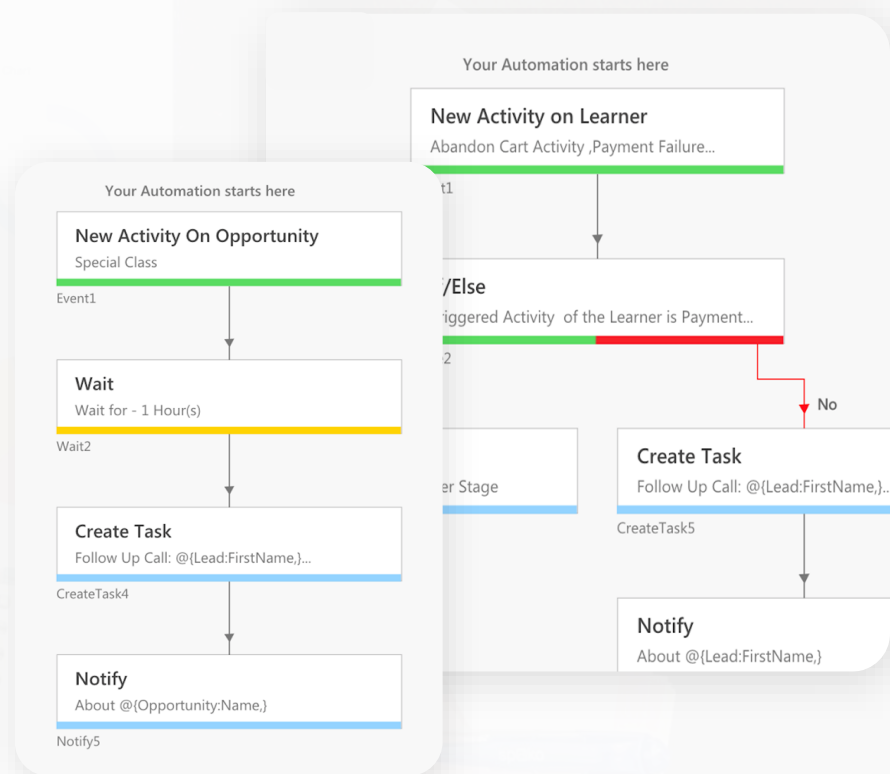
Automations

New Triggers

- New / Update Opportunity
- New / Update Activity on Opportunity
- Opportunity Task Create, Reminder & Complete


New Actions

- Lead Actions - Add opportunity
- Add Activity / Task on Opportunity
- Update Opportunity
- Distribute Opportunity



Opportunity Setup in LSQ

Forms & Processes


DASHBOARD CONTENT MARKETING LEARNERS WORKFLOW APPS REPORTS

Automation ? +

Type	Status	Modified By	Modified On
All	Published	Any	All Time

Name	Type	Unique Record Count	Trigger Count	Last Published On	Status	Modified On	Modified By	Actions
Automation - Payment Activities	Activity Added	0	0	07/15/20	Published	07/15/20	Utkarsh Rai	
Special Class - Follow Up	Opportunity Activity Added	0	0	07/15/20	Published	07/15/20	Utkarsh Rai	
Automation - Agreed to pay activity	Opportunity Activity Added	1	1	07/15/20	Published	07/15/20	Utkarsh Rai	
Update Paid Subscription Count	Opportunity Updated	2	2	07/12/20	Published	07/12/20	Utkarsh Rai	
Add follow up task on new opportunities	Opportunity Added	3	3	07/12/20	Published	07/12/20	Utkarsh Rai	
Update Source for duplicate enquiry	Learner Updated	0	0	07/12/20	Published	07/12/20	Utkarsh Rai	
Create Opportunity	Learner Created	2	2	07/12/20	Published	07/12/20	Utkarsh Rai	

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+


Create Automation

Related Settings

- [Manage Lists](#)
- [Manage Custom Fields](#)
- [Manage Custom Activities](#)
- [Manage Learner Assignment Quota](#)
- [Automation Failure Report](#)


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Opportunity Setup in LSQ

Forms & Processes - Agent Popup









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Manage Processes ?

Q

Status Any Trigger All Application Any Modified By Any Modified On All Time

Name	Trigger Type	Status	Modified On	Modified By	Actions
Process - Add / Edit Opportunity	 At Specific Work Area	Published	07/16/20	Utkarsh Rai	
Agent Popup - Add / Edit Opportunity	 At Specific Work Area	Published	07/15/20	Utkarsh Rai	
Update stage & owner on task complet...	 On Task Completion	Unpublished	07/15/20	Utkarsh Rai	
Add / Edit Opportunity	 At Specific Work Area	Published	07/12/20	Utkarsh Rai	

Show 25 1 - 4 of 4 < 1 >

** Changes will be reflected after 5 minutes.*

+ Create Process

Related Settings


[Manage Forms](#)


[Manage Custom Fields](#)

[Manage Custom Activities](#)

[object Object]

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A photograph of three hands holding coffee cups with latte art, overlaid with a blue tint. The text "Break" is centered in white, with a horizontal line underneath it. Below the line, the text "Just in case is needed" is written in a smaller white font.

“Break”

Just in case is needed




Coming to Sales Rep

Sales to be driven on opportunities rather than contact

Opportunities in LSQ

Smart Views - Opportunities / Activities & Tasks associated with Opportunities


unacademy

DASHBOARD CONTENT MARKETING LEARNERS WORKFLOW APPS REPORTS

Manage Opportunities

Actions

<input type="checkbox"/>	Opportunity Name ↓	Learner Name	Status	Stage	Source - Name	Goal Name	Plan Selected	Pr
<input type="checkbox"/>	Zollie Matusevich - WBPSC	zollie.matusevich@gmail.com	Open	Warm	Direct	WBPSC	2 years	20
<input type="checkbox"/>	Zitella Morad - ESE	zitella.morad@gmail.com	Lost	Wrong Number	Referral	ESE	6 months	20
<input type="checkbox"/>	Zebulen Corah - Karnataka PSC	zebulen.corah@gmail.com	Open	New	Organic	Karnataka PSC	1 year	20
<input type="checkbox"/>	Zea Rozec - CSIR-UGC NET	zea.rozec@gmail.com	Won	Subscribed - Non Referral	Outbound Phone Call	CSIR-UGC NET	1 year	20
<input type="checkbox"/>	Zared Whatsize - Teacher Eligibility ...	zared.whatsize@gmail.com	Open	Cold	Direct	Teacher Eligibility Test (TET)	1 year	20
<input type="checkbox"/>	Zandra Gilfether - Ujian Tulis Berbas...	zandra.gilfether@gmail.com	Won	Subscribed - Non Referral	Inbound Phone Call	Ujian Tulis Berbasis Komputer	2 years	20
<input type="checkbox"/>	Zack Flasby - WBPSC	zack.flasby@gmail.com	Won	Subscribed - Non Referral	Referral	WBPSC	3 months	20
<input type="checkbox"/>	Zacharie Barnardo - CDS/AFCAT/CA...	zacharie.barnardo@gmail.com	Open	Warm	Referral	CDS/AFCAT/CAPF	2 years	20
<input type="checkbox"/>	Zabrina Domengue - MPPSC & VYA...	zabrina.domengue@gmail.com	Open	Cold	Referral	MPPSC & VYAPAM	1 month	20
<input type="checkbox"/>	Yvon Skatcher - Bank Exams	yvon.skatcher@gmail.com	Won	Subscribed - Non Referral	Referral	Bank Exams	1 year	20

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Opportunities in LSQ

Agent Popup

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Smart Views

Opportunities - This Week
609
Details

Lost - Opportunities
193

Won - Opportunities
203

Open - Upsell Opportunities
6

Opportunities - Agreed to ...
5

Any Stage Any Status Any Any Owner Expected Closur... All Time
Actions

<input type="checkbox"/>	Opportunity Name	Learner Name	Expected Deal Size	Status	Stage	Owner	Expected Closure Date	Goal Name
<input type="checkbox"/>	Arluene Blasing - Teacher Eligibility ...	arluene.blasing@gmail.com	8788	Won	Subscribed - Non Referral	Rohan Sane	06/23/20 12:00 AM	Teacher Eligibility
<input type="checkbox"/>	Kermit Kitcherside - Kerala PSC	kermit.kitcherside@gmail.com	9311	Open	Warm	Rohan Sane	10/25/19 12:00 AM	Kerala PSC
<input type="checkbox"/>	Fritz McGinn - Bank Exams	fritz.mcginn@gmail.com	8841	Won	Subscribed - Referral	Rohan Sane	05/13/20 12:00 AM	Bank Exams
<input type="checkbox"/>	Tymothy Oughtright - Foundation ...	tymothy.oughtright@gmail.com	5273	Won	Subscribed - Non Referral	Rohan Sane	10/28/19 12:00 AM	Foundation & NT
<input type="checkbox"/>	Adriana Prettyjohn - APPSC	adriana.prettyjohn@gmail.com	7198	Open	New	Utkarsh Rai	08/14/19 12:00 AM	APPSC
<input type="checkbox"/>	Mimi McTrusty - IIT-JAM	mimi.mctrusty@gmail.com	17708	Won	Subscribed - Non Referral	Rohan Sane	10/30/19 12:00 AM	IIT-JAM
<input type="checkbox"/>	Carmelle Sprowson - UPPSC	carmelle.sproson@gmail.com	20797	Lost	Not Interested	Rohan Sane	01/25/20 12:00 AM	UPPSC
<input type="checkbox"/>	Florance Warmisham - RPSC	florance.warmisham@gmail.com	12114	Open	New	Rohan Sane	06/30/20 12:00 AM	RPSC
<input type="checkbox"/>	Jesus Whittlesea - IIT JEE	jesus.whittlesea@gmail.com	3942	Won	Subscribed - Non Referral	Rohan Sane	05/23/20 12:00 AM	IIT JEE
<input type="checkbox"/>	Utkarsh Rai - Opportunity	Utkarsh Rai		Open	New	Rohan Sane		CA Exams

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Opportunities in LSQ

Manual Opportunity Creation

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Manage Opportunities

Search Opportunities Advanced Search

Actions


Learner Stage	Status	Product	Owner	Date Range	Expected Closure...	All Time	
Opportunity Name	Learner Name	Status	Stage	Source - Name	Goal Name	Plan Selected	Pr
<input type="checkbox"/> Arluene Blasing - Teacher Eligibility ...	arluene.blasing@gmail.com	Won	Subscribed - Non Referral	Direct	Teacher Eligibility Test (TET)	2 years	20
<input type="checkbox"/> Kermit Kitcherside - Kerala PSC	kermit.kitcherside@gmail.com	Open	Warm	Direct	Kerala PSC	1 year	20
<input type="checkbox"/> Fritz McGinn - Bank Exams	fritz.mcginn@gmail.com	Won	Subscribed - Referral	Outbound Phone Call	Bank Exams	3 months	20
<input type="checkbox"/> Timothy Oughtright - Foundation ...	timothy.oughtright@gmail.com	Won	Subscribed - Non Referral	Inbound Phone Call	Foundation & NTSE	3 months	20
<input type="checkbox"/> Adriana Prettyjohn - APPSC	adriana.prettyjohn@gmail.com	Open	New	Direct	APPSC	6 months	20
<input type="checkbox"/> Mimi McTrusty - IIT-JAM	mimi.mctrusty@gmail.com	Won	Subscribed - Non Referral	Direct	IIT-JAM	6 months	20
<input type="checkbox"/> Carmelle Sprowson - UPPSC	carmelle.sprowson@gmail.com	Lost	Not Interested	Referral	UPPSC	1 year	20
<input type="checkbox"/> Florance Warmisham - RPSC	florance.warmisham@gmail.com	Open	New	Organic	RPSC	1 month	20
<input type="checkbox"/> Jesus Whittlesea - IIT JEE	jesus.whittlesea@gmail.com	Won	Subscribed - Non Referral	Inbound Phone Call	IIT JEE	1 month	20
<input type="checkbox"/> Utkarsh Rai - Opportunity	Utkarsh Rai	Open	New		CA Exams	6 months	20

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Opportunities in LSQ

Opportunity Details Page


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Search Upsell Opportunities
Advanced Search

Actions


Learner Stage	Any	Status	Any	Product	Any	Owner	Any	Date Range	Expected Closure...	All Time
Opportunity Name	Learner Name	Goal Name	Status	Status - Reason	Owner	Actions				
<input type="checkbox"/> Akansha Srivastava - NEET UG	Akansha Srivastava	NEET UG	Won	Subscribed - Referral	Utkarsh Rai					
<input type="checkbox"/> Akansha Srivastava - SSC Exams (6 ...	Akansha Srivastava	SSC Exams	Open	Warm	Utkarsh Rai					
<input type="checkbox"/> John Smith - UPSC CSE	John Smith	UPSC CSE	Lost	Not Interested	Utkarsh Rai					
<input type="checkbox"/> John Smith- IIT JEE	Akansha Srivastava	IIT JEE	Open	New - Contacted	System					
<input type="checkbox"/> Micheal Clark - Something in goal n...	Micheal Clark	UPSC CSE	Open	New	System					
<input type="checkbox"/> Utkarsh Rai - UPSC CSE	Utkarsh Rai	UPSC CSE	Open	New - Contacted	Rajesh Aggarwal					

Show 25 **1 - 6 of 6**

< 1 >


[object Object]

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Opportunities in LSQ

Contact Details Page


DASHBOARD CONTENT MARKETING LEARNERS WORKFLOW APPS REPORTS

Smart Views

My Tasks
11

Open - Opportunities
225
 [Details](#)

Opportunities - This Week
...

Lost - Opportunities
...

Won - Opportunities
...

Actions

<input type="checkbox"/>	Opportunity Name	Learner Name	Status	Stage	Goal Name	Owner	Plan Selected	Preparing for Ye
<input type="checkbox"/>	Jackson Strome - Opportunity	Jackson Strome	Open	New	CAT	Utkarsh Rai	1 year	2021
<input type="checkbox"/>	Akansha Srivastava - Opportunity	Akansha Srivastava	Open	New	GATE	Anu V	1 month	2020
<input type="checkbox"/>	Ishank Ahuja - Opportunity	Ishank Ahuja	Open	New	GPSC	Rohan Sane	3 months	2024
<input type="checkbox"/>	Utkarsh Rai - Opportunity	Utkarsh Rai	Open	New	CA Exams	Rohan Sane	6 months	2020
<input type="checkbox"/>	- Opportunity	heall.mcclintock@gmail.com	Open	New	NTA-UGC NET	Rajesh Aggarwal	1 year	2021
<input type="checkbox"/>	Manish Garg - Opportunity	Manish Garg	Open	New	Bank Exams	Rajesh Aggarwal	1 year	2021
<input type="checkbox"/>	Rahul Yadav - Opportunity	Rahul Yadav	Open	Hot	GATE	Anu V	6 months	2020
<input type="checkbox"/>	Rahul Yadav - Opportunity	Rahul Yadav	Open	New	IELTS	Anu V	3 months	2020
<input type="checkbox"/>	Alf Tedstone - NEET UG	alf.tedstone@gmail.com	Open	Cold	NEET UG	Utkarsh Rai	1 year	2025
<input type="checkbox"/>	Allayne Giraudy - UPSC CSE	allayne.giraudy@gmail.com	Open	Warm	UPSC CSE	Utkarsh Rai	3 months	2020

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Opportunities in LSQ

Automation reports

unacademy 🇬🇧 Dashboard Content Marketing Learners Workflow Apps Reports 🔍 🔔 ? 👤

Manage Opportunities ?

Search Opportunities 🔍 Advanced Search 🔍 Actions ⌵ ⏪

Learner Stage	Any	Status	Any	Product	Any	Owner	Any	Date Range	Expected Closure...	All Time	
<input type="checkbox"/>	Opportunity Name	Learner Name	Status	Stage	Source - Name	Goal Name	Plan Selected	Pri			
<input type="checkbox"/>	Arluene Blasing - Teacher Eligibility ...	arluene.blasing@gmail.com	Won	Subscribed - Non Referral	Direct	Teacher Eligibility Test (TET)	2 years	20			
<input type="checkbox"/>	Kermit Kitcherside - Kerala PSC	kermit.kitcherside@gmail.com	Open	Warm	Direct	Kerala PSC	1 year	20			
<input type="checkbox"/>	Fritz McGinn - Bank Exams	fritz.mcginn@gmail.com	Won	Subscribed - Referral	Outbound Phone Call	Bank Exams	3 months	20			
<input type="checkbox"/>	Tymothy Oughtright - Foundation ...	tymothy.oughtright@gmail.com	Won	Subscribed - Non Referral	Inbound Phone Call	Foundation & NTSE	3 months	20			
<input type="checkbox"/>	Adriana Prettyjohn - APPSC	adriana.prettyjohn@gmail.com	Open	New	Direct	APPSC	6 months	20			
<input type="checkbox"/>	Mimi McTrusty - IIT-JAM	mimi.mctrusty@gmail.com	Won	Subscribed - Non Referral	Direct	IIT-JAM	6 months	20			
<input type="checkbox"/>	Carmelle Sprowson - UPPSC	carmelle.sprowson@gmail.com	Lost	Not Interested	Referral	UPPSC	1 year	20			
<input type="checkbox"/>	Florance Warmisham - RPSC	florance.warmisham@gmail.com	Open	New	Organic	RPSC	1 month	20			
<input type="checkbox"/>	Jesus Whittlesea - IIT JEE	jesus.whittlesea@gmail.com	Won	Subscribed - Non Referral	Inbound Phone Call	IIT JEE	1 month	20			
<input type="checkbox"/>	Utkarsh Rai - Opportunity	Utkarsh Rai	Open	New		CA Exams	6 months	20			

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Opportunity Reports

1D & 2D Opportunity Reports

The screenshot displays the LeadSquared Reports Home interface. The top navigation bar includes the LeadSquared logo, a language selector, and a menu with options: DASHBOARD, CONTENT, MARKETING, STUDENTS, WORKFLOW, APPS, and REPORTS. A search bar for reports is located on the right. The main content area is titled 'Reports Home' and features a 'Categories' section on the left with a grid of report categories, each with an icon, title, count, and description. On the right, there are two vertical lists: 'Most Frequently Used' and 'What's New', each containing report titles and counts. A blue chat bubble icon is visible in the bottom right corner.

leadSquared 🇬🇧 🔍 🔔 ? 👤

DASHBOARD ▾ CONTENT ▾ MARKETING ▾ STUDENTS ▾ WORKFLOW ▾ APPS ▾ REPORTS ▾

Reports > All ▾ 🔍 Search Reports

Reports Home

Categories

Account (Company) Insights (3)
Reports for B2B companies to analyze data by Companies or Accounts

Administrative Reports (8)
Reports for the Admins to analyze user logins, user lists and groups

Audit Logs (7)
Reports helping you analyze change logs of various features

Customer Analysis (4)
These reports help you analyze customers and how you acquired them

Emails and Marketing Automation (9)
Everything about your emails - Campaigns, Automated Emails and one-one emails

Field Sales Tracking (3)
Reports to help track field sales team

Large Exportable Reports (12)
List of reports with large data sets that you can export and receive through email

Lead Insights (26)
These reports give you insight on your lead data across various attributes and time periods

Lead Source Analysis (9)
Helps you analyze lead submission and capture sources

Lead Stage Analysis (10)
Helps you analyze data by Lead Stages

Opportunity Insights (4)
Revenue performance analytics - find revenue generated by User, Source, Geography and other parameters

Sales Group-Wise Analysis (18)
Analyze sales user performance and get lead insights by Sales Groups

Most Frequently Used ▾

- Sales Activity List
- All Leads with filters (exportable)
- Activities by Users - Historical

What's New ▾

- Activity Count by Leads (Exportable)
- Check-in and Check-out History (Exportable)
- Activity List by Accounts
- Day Attendance Report (Exportable)
- GA Report - Users by Country

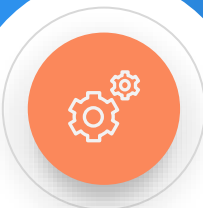
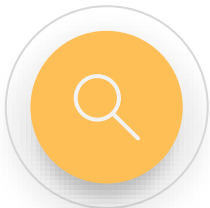
💬

JAS - Roadmap

Opportunity Management

Opportunities on Mobile

Will be launched by Sep



Last Activity On

New Opportunity Field:
Last Activity on

V2 APIs

APIs related to
Opportunities, activities
& tasks



Emails

Associate emails with
opportunities



Documents Tab

Documents tab on
opportunity details page



FAQs

01 Is opportunity management a licensed feature?

No, its not a licensed feature.

02 Will it come by default in all new tenants?

Yes, once its out of beta phase, it will be available by default for all our new tenants

03 How many pipelines / opportunity types can be created in a tenant?

As of now there is no limitations in terms of number of opportunity types that can be created in a tenant.

04 Is opportunity available for B2B customers?

No. Opportunity management will support only B2C use cases.

05 Is opportunity sharing available?

No, opportunity sharing is not available as of now.

FAQs

06 How will permissions work in case of group managers & sales users?

Click on this [link](#) for detailed document on permissions related to opportunities

07 How to migrate existing tenants on opportunity mgmt?

Migration will not be possible. It must be a new implementation. As on today, we don't have any data migration tool available.

08 Will opportunity have any ID like prospect ID?

Yes, every opportunity will have its unique GUID

A group of silhouettes of people in various celebratory poses, such as jumping and raising their arms, set against a blue gradient background.

“Thank You”

Big thanks to all cross functional teams in helping with use case collection & feedbacks at every step of product development & design.