Sales – CRM (Leads & Opportunities) SOP

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Reviewed By: Carla Skuhrovec

Purpose

This SOP defines the required process for managing **Sales Leads and Opportunities** in Odoo CRM. Its purpose is to ensure consistent pipeline ownership, accurate forecasting and reporting of revenue and MRC, disciplined sales follow-up, and reliable handoff to Operations and Service teams.

Odoo serves as the single system of record for Sales pipeline activity. Proper Lead qualification and Opportunity management are critical to leadership visibility, forecasting accuracy, and customer experience.

Note:
Creation and maintenance of Company and Person contact records are governed by the approved **Contacts SOP**. This SOP assumes those standards and focuses exclusively on how Sales users work Leads and Opportunities within the CRM lifecycle. Accurate capture of **Lead Source and Lead Medium** is required at Lead and Opportunity creation to support marketing attribution, pipeline analysis, and revenue reporting.

Use Case

This SOP applies to all Sales team members using Odoo CRM. It covers:

- When and how **Leads** are created and qualified

- Converting Leads into **Opportunities**
- Opportunity ownership and stage progression
- Required Sales data discipline for pipeline accuracy and forecasting
- Sales responsibilities for maintaining CRM hygiene throughout the sales lifecycle

Opportunity Data Quality & Governance Standards (Mandatory)

Odoo CRM is the single system of record for Sales activity, pipeline forecasting, and operational handoff. Data quality within Opportunities is mandatory and directly impacts reporting accuracy, leadership visibility, and successful adoption of Odoo.

The following standards apply to **all Sales users**, **all Opportunities**, and **all CRM modules**.

General Expectations

- All Opportunities must be maintained accurately and updated **same business day** when activity occurs.
- Opportunities must always reflect the correct pipeline stage based on actual sales activity.
- Opportunities must be explicitly marked **Won** or **Lost** using system actions. Dragging cards in Kanban view alone is not sufficient.
- Opportunities that cannot meet the minimum data requirements defined below do not qualify as Opportunities and should remain in **Leads** until sufficient information is available.

Opportunity Structure & Naming Convention (Required)

All Opportunities must follow the standardized naming convention:

Company – Technology – Supplier

Examples:

- Meijer – RingEX – RingCentral
- Meijer – RingCX – RingCentral
- Meijer – CCaaS Implementation – Symplicity

Separate Opportunities are required when:

- Multiple technologies are being sold to the same customer
- Sales and Professional Services are involved
- Products and services have distinct scopes, suppliers, or revenue structures

Activity & Next-Step Discipline (Required)

Every active Opportunity must have:

- At least one **future-dated Activity**

- An assigned owner responsible for completion
- Clear notes describing what must occur to complete the activity

Accepted Activity types include:

- To-Do
- Calls
- Meetings (auto-logged when associated correctly)
- Documents
- Signature

Opportunities without a defined next step are considered incomplete and do not meet CRM data quality standards.

Notes, Chatter & Communication Standards

Opportunities must contain sufficient internal notes to allow any internal user to understand:

- What the Opportunity is for
- Current status and next steps
- Who owns follow-up actions
- Any internal or external blockers

All internal communication related to an Opportunity must be logged in the Opportunity chatter. When messaging internal stakeholders, Sales must log a note and @tag the relevant user.

All external communication related to an Opportunity must originate in Odoo chatter to ensure email capture and activity logging. The first outbound email must be sent from Odoo to trigger integration and tracking.

Required Opportunity Fields (Minimum Standard)

At a minimum, all Opportunities must have the following fields completed:

Top Data Card

- Expected revenue components (SPIFF, residual commission, contract term), if known
- Expected closing date (estimated and updated as needed)
- Applicable tags

Notes Tab

- A clear description of the Opportunity, strategy, and qualification rationale

Contacts Tab

The Contact field on the Opportunity must reflect the **primary Point of Contact (POC)** for the sales engagement.

When completing the Contact field on an Opportunity:

• Select the individual who is the primary decision-maker or day-to-day contact for the Opportunity
• Ensure the Contact is associated with the correct Company record
• Capture the Contact's name and job title

Do not use the Contact field to store site-level details, generic locations, or placeholder records unless explicitly required by the engagement.

Email address and phone number behavior is governed by the Contacts SOP and applicable CRM data-handling standards. In scenarios where entering contact details would overwrite shared Contact records, communication details should be documented in the Opportunity notes or description instead.

The Contact field should always represent **who Sales is working with**, not where the service is being delivered.

- Associated Contact name
- Job title
- Company website

Marketing Attribution

- Medium (how the lead was contacted or delivered)
- Source (where the lead originated)
- Referred By (if applicable)

Opportunities with existing quotes (supplier or Symplicity) must have all revenue-related fields fully completed.

Enforcement & Governance

Maintaining CRM data quality is a core Sales responsibility.

Failure to comply with these standards undermines forecasting accuracy, reporting integrity, and operational execution and may be addressed through CRM audits, pipeline reviews, or leadership intervention.

If users encounter system limitations, access issues, or identify opportunities for improvement, they must submit an Odoo Helpdesk ticket for review.

Contact Data Handling for Site-Based Opportunities (Required)

When adding site-level contacts or locations to an Opportunity, Sales must exercise care to avoid unintentionally modifying shared Contact records in the Contacts module.

In scenarios where a site or location is added as a Contact within an Opportunity:

- **Do not enter or update email addresses or phone numbers** on the Contact record.
- Editing these fields will overwrite the Contact information globally in the Contacts module, which may impact other Opportunities and teams.

In these instances:

- The **Contacts tab** may be used to capture:
  - Point of Contact (POC) name
  - Job title
- **Email address and phone number for the POC must be documented in the Opportunity description or notes section**, not on the Contact record.

This approach ensures:

- Accurate Opportunity-level communication details
- Protection of shared Contact data
- No unintended changes to site or company Contact records used elsewhere in the system

Company information that auto-populates from the Contacts module (company name, address, website, etc.) should remain unchanged.

Systems, Tools & Templates

- Odoo CRM Module

Definitions

- **Lead:** An early-stage, unqualified prospect or inbound inquiry
- **Opportunity:** A qualified sales engagement actively being pursued
- **Owner:** The Sales user responsible for progressing a Lead or Opportunity
- **Pipeline Stage:** The defined phase of an Opportunity within the sales process

Step-by-Step Procedure

1. Leads

Leads represent early-stage prospects or inbound inquiries that have not yet been sales-qualified.

Leads:

- May be incomplete or unverified
- Serve as a temporary holding area for unqualified prospects
- Must be reviewed promptly by Sales

Lead Source & Medium Capture (Required)

At the time a Lead or Opportunity is created, Sales is responsible for capturing:

- **Lead Source** (e.g., referral, inbound, outbound, partner, event, marketing campaign)
- **Lead Medium** (e.g., email, phone, LinkedIn, website form, in-person, webinar)

Requirements:

- Lead Source and Lead Medium must be populated at creation whenever known
- If unknown at creation, fields must be updated as soon as information is identified
- These fields must remain accurate throughout the sales lifecycle

Lead Source and Lead Medium data is used for marketing attribution, performance analysis, and revenue forecasting. Incomplete or inaccurate data undermines reporting integrity.

Sales Responsibilities:

- Review all assigned Leads in a timely manner
- Determine whether the Lead should be:
  - Qualified and converted into an Opportunity, or
  - Disqualified if not a fit
- Ensure Leads do not remain idle or unworked

Leads should only exist as long as qualification is pending. Prolonged inactivity undermines pipeline accuracy.

2. Opportunities

Opportunities represent qualified sales engagements and are the foundation for forecasting, revenue reporting, and operational handoff.

Sales is responsible for maintaining accurate Opportunity data throughout the sales lifecycle.

2.1 Marketing Attribution Fields (Required)

At the time an Opportunity is created or qualified, Sales must ensure the following fields are accurately captured for reporting:

- **Campaign** (if applicable)
- **Source**
- **Medium**
- **Referred By** (if applicable)

System behavior:

- Campaign will populate automatically when applicable
- Source will populate automatically for marketing-generated leads
- For manually created Opportunities, Sales must manually complete all applicable fields

If a required **Source** value does not exist, Sales must submit an **Odoo support ticket** to request a new value. Placeholder or inaccurate values must not be used.

2.2 Opportunity Closure: Won vs Lost (Required Process)

Opportunities must be **explicitly closed** using system actions and must not be closed solely by dragging them to a Kanban stage.

Required actions:

- Use **Mark as Won** when a deal results in a signed agreement and confirmed Sales Order
- Use **Mark as Lost** when a deal does not proceed, selecting an accurate loss reason

Dragging an Opportunity to a closed stage does not complete required system actions and results in inaccurate reporting.

2.3 Opportunity Priority Indicator (Optional)

Odoo provides an optional priority indicator (star rating) on Opportunities.

The priority indicator:

- Is set at the discretion of the Salesperson
- Does not impact forecasting, probability, or reporting
- Does not replace required stage movement or activity discipline
- Is intended as a visual organization and workflow aid only

When priority sorting is enabled in the Kanban view, higher-priority Opportunities appear higher in the pipeline, allowing Sales users to visually emphasize deals requiring immediate attention.

No formal criteria or enforcement standards are defined for priority usage. Sales users may adjust priority based on urgency, strategic importance, or individual workflow preference.

Requirements for Closing an Opportunity as Won

An Opportunity may only be marked **Won** when:

- The contract or agreement is fully executed
- All required Opportunity fields are complete
- Revenue reflects the signed contract
- Products, pricing, and term match the Sales Order

Opportunities with incomplete, inaccurate, or placeholder information must not be marked as Won.

Opportunity Stages (Current Odoo Configuration)

Opportunities progress through the following Sales stages in Odoo CRM. These stages reflect the current configured pipeline and must be used consistently.

- **Qualified**
  Initial qualification completed. Customer interest, authority, and basic fit confirmed.
- **Discovery**
  Active discovery and requirements gathering in progress.
- **Proposal Preparation**
  Solution design, pricing, and proposal development underway. Quotes may be in progress but not yet formally presented.
- **Solution Presented**
  Proposal or solution has been formally presented to the customer. Feedback, clarification, or revisions may be in progress.
- **Committed**
  Customer has indicated intent to move forward. Final approvals, signatures, or closing steps are in progress.
- **Closed – Won**
  Contract or agreement fully executed and Sales Order confirmed.
- **Closed – Lost**
  Opportunity did not close. A Lost Reason is required.
- **Cancelled**
  Opportunity intentionally discontinued without a competitive loss.

Opportunities must only advance stages when the corresponding sales activity has occurred. Stage movement must reflect actual customer engagement and progress, not pipeline cleanup.

Special Handling: Non-Revenue or Free Deals

- Opportunities with zero or negative revenue must be reviewed before closure
- These may only be closed as Won when intentionally approved and documented
- Otherwise, they should be closed as Lost or handled per leadership guidance

3. Lead Qualification & Conversion

A Lead should be converted into an Opportunity once Sales confirms:

- A legitimate sales use case exists
- The prospect meets qualification criteria
- Active sales engagement is expected

Upon conversion:

- An Opportunity is created in the appropriate pipeline
- Ownership must be assigned
- The Opportunity stage must reflect the current sales reality
- Relevant Contact and Company records must be associated in accordance with the Contacts SOP

Sales users must not bypass Lead qualification by creating Opportunities without context or validation.

4. Opportunities

Opportunities represent qualified sales efforts and are the foundation for forecasting, reporting, and operational handoff.

Sales Responsibilities:

- Maintain accurate Opportunity ownership at all times
- Progress Opportunities through pipeline stages based on actual sales activity
- Ensure required Opportunity fields are completed and kept current
- Log activities and updates consistently to reflect real sales progress

Pipeline stages must reflect reality. Advancing or stalling Opportunities inaccurately compromises reporting and leadership visibility.

5. CRM Data Discipline

Sales users are responsible for maintaining CRM accuracy by:

- Keeping Leads and Opportunities up to date
- Avoiding duplicate or abandoned records
- Ensuring Opportunities accurately reflect deal status, value, and timing
- Using Odoo as the single source of truth for all sales activity

CRM hygiene is a shared responsibility and is critical to forecasting, operational execution, and customer experience.

Exceptions & Escalations

Any exception to this SOP, uncertainty regarding ownership, or questions about proper Lead or Opportunity handling should be escalated to:

Director of Operations

Related Policies or SOPs

- SOP – Sales – Contacts Management
- SOP – Sales – Opportunity Lifecycle & Activities
- SOP – Sales – Quotes, Orders & Sign

Version Control

Version	Date	Author	Summary of Changes
1.0	01/04/2025	Nick S.	Initial creation
1.1	01/04/2025	Nick S.	Clarified ownership and sales responsibilities
1.2	01/06/2025	Carla S.	Redline redaction of contacts SOP data as an approved Contacts SOP exists