**Email Template**

Please edit and amend based on the month, your relationship with the stakeholders and their level of experience

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Hi Team,

We are one week away from [Insert M1/M2/M3] forecast

Please review the following three focus points:

## **Focus 1: Clean Non-Compliant Opportunities** **( [ADD NC Opps] Opportunities as of today)**

As a reminder, here is the criteria for Non-Compliant opportunities:

1. Instruments or Opportunities >$50k
2. Last Modified Date
	1. Close date CQ: 14 days
	2. Close date: CQ+ 1: 30 days
	3. Close date CQ+ 2: 45 days
	4. Close date CQ +3 and more: 180 days

You can find the non-compliant opportunities split by criteria in the [**Sales Cockpit**](https://illumina.lightning.force.com/lightning/r/Dashboard/01Z8X000001UlHSUA0/view?queryScope=userFolders) **[ADD your SR cockpit]**

As a reminder, you can open each Non-Compliant Opportunity report from the Sales Cockpit and update the opportunities by clicking the ‘Enable Field Editing’ button:



## **Focus 2: Use new** [**Instrument Pipeline**](https://tableau.illumina.com/t/Commercial/views/EuropePipelineHealth_16764766642610/HelicopterView) **dashboard when inputting in TM1**

1. Check your Rollup vs Forecast for discrepancies. Any variance can indicate misalignment between SFDC (which feeds your Rollup) and TM1 (which feeds your Forecast):



1. Adjust your pipeline (SFDC) or TM1 forecast accordingly.

## **Focus 3: Clean Opportunity Stage to reflect accurate pipeline [only for M2/M3]**

***\*Reminder to record competitor information which they can visualize in the competitors view dashboard (Sales Cockpits)***

***\*\*Depending on the month, remind them about the stages and send screenshot***

Once you have completed these steps, going into the forecast week you will have ensured that all the system and large opportunities are scrubbed, SFDC & TM1 are aligned, and any discrepancy between Rollup and Forecast is understood.

Thank you

Sales Ops

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