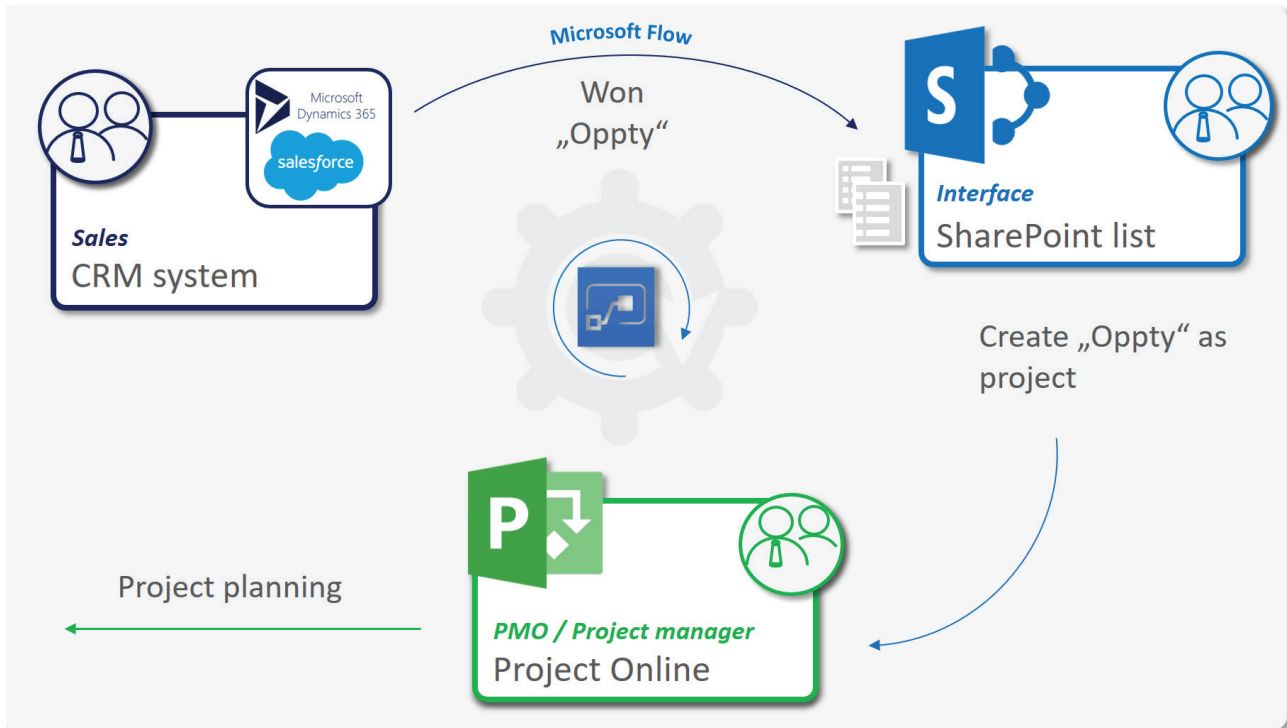


# TPG Oppty2Project

The intelligent solution for automating data transfer between sales and project teams



**TPG Oppty2Project:** a combination of your CRM system, Microsoft SharePoint, Microsoft Flow and Project Online.

Once an opportunity turns into an order and a real project, the project manager needs all the relevant data from the sales team. But that can be a challenge: how can you be sure that you’ve really received every single piece of information required, so you can set up the project quickly and correctly?

Many companies have decentralized data storage and people send information back and forth manually multiple times during the agreement process. That makes it much more time-consuming to keep a handle on data transfer – and it’s very error-prone too.

This is where the ready-to-use solution *TPG Oppty2Project* comes in. Based on the mobile Microsoft O365 Flow app, it ensures smooth and automatic data transfer between your sales and project management teams. That helps you significantly increase the efficiency – and especially the reliability – of your project setup.

## YOUR BENEFITS AT A GLANCE:

- ▶ **Efficient:** The automation of the data transfer is reliable and reduces the workload for sales project managers.
- ▶ **Transparent:** The centralized data storage always gives a clear overview over won sales opportunities.
- ▶ **Preconfigured:** The solution is ready to use quickly.
- ▶ **Future-ready:** Microsoft SharePoint and cloud technology makes you flexible for future enhancements.

## THE PROCESS FROM THE OPPTY TO THE PROJECT

- ▶ **Step 1:** After the assignment, the sales department marks an opportunity as “won” in the CRM system.
- ▶ **Step 2:** TPG Oppty2Project creates a new project in Microsoft Project Online with all relevant field values.
- ▶ **Step 3:** The project manager can start planning the project right away – the basic information is already in place.

[www.theprojectgroup.com/oppty2project](http://www.theprojectgroup.com/oppty2project)

## Turnkey solution for quick improvements

The implementation of *TPG Oppty2Project* is easy: The solution is preconfigured and „remotely“ deployed.

### WHAT DOES TPG OPPTY2PROJECT INCLUDE?

- ▶ A SharePoint list for “won opportunities” with 3 predefined fields (title / project owner / project type)
- ▶ Configuration of 5 Enterprise Project Fields to transfer relevant fields from one system into the other
- ▶ SharePoint workflow and Microsoft Flow configuration to create projects in Project Online
- ▶ Options for adaptation of basic version (e.g. extending the SharePoint list with additional fields)

### YOUR THREE STEPS TO THE SOLUTION

#### Phase 1: Delivery of basic system

**Activities:** Run kick-off & configuration workshop, execute configuration\*, create configuration documentation, hand-over of system and acceptance

**Deliverables:** Configuration documentation

**Duration:** Approx. 1-2 weeks (Microsoft and CRM solution installation / configuration / licenses not included)

#### Phase 2: Training

**Activities:** Prepare and carry out half a day training for sales and project managers

**Deliverables:** Standard training documentation

**Duration:** Approx. 1 week

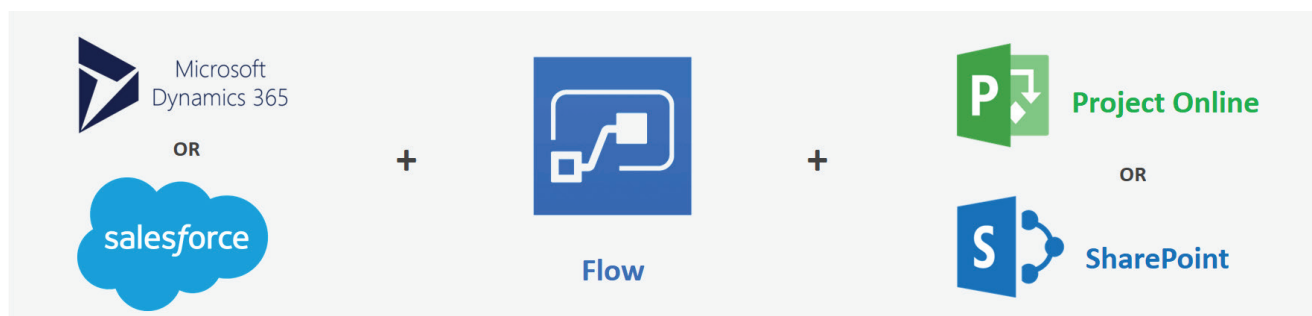
#### Phase 3: Extension of basic system

**Activities:** 8 hours consulting for coaching, support and extensions (to be ordered within 4 weeks after system hand-over), final project meeting

**Deliverables:** Updated configuration documentation

**Duration:** Approx. 1-2 weeks

\*Before you get started, please ensure that you meet the license-related requirements. In order to run *TPG Oppty2Project* you need the following licenses:



If you don't have the relevant licenses yet, you can acquire them from TPG The Project Group as well.

**Questions?** Just email us at [info@theprojectgroup.com](mailto:info@theprojectgroup.com) or call us on: **+49 (89) 61559330**