Planning worksheet

Fullcast Holdout Policy Worksheet

Fullcast's holdout policy allows you to specify rules for transitioning opportunities when account ownership changes. When a holdout is applied to a given opportunity, a lightning flag appears on the opportunity page layout. Additionally, a record is created in Fullcast's Holdout custom object. Opportunities are evaluated in this order: **Exempt** (dropped out), then **Eligible** (considered for holdout), then **Ineligible** (transferred immediately). Answer the following questions to prepare for configuring your holdout policy in Fullcast.

Exempt Opportunities

Identify opportunities that will NOT be considered for holdouts under the policy.

1. **Holdout Selection Criteria:** What criteria make an opportunity exempt (excluded) from this policy, regardless of any other eligibility?
2. **Current and Outgoing Owner Must Match:** Should this policy only apply if the Current and Outgoing Owner are the same user?

Eligible Opportunities

Identify opportunities that will be considered for holdouts under the policy.

3. **Holdout Selection Criteria:** What criteria must an opportunity meet to be eligible for the automated holdout process?
4. **Holdout Restrictions (Optional):** Do you need to limit the total number of holdout opportunities any single rep can possess at one time?
5. **Holdout Restrictions - Sort By and Order By (If Limited):** How should the system Sort By and Order By opportunities to decide which ones are immediately transferred?

Participant Selection Period (Optional)

Determine whether to allow a period of time for account owners to select which opportunities to hold out.

6. **Participant Selection Period:** Do you want to allow a "selection period" during which reps can select which opportunities they want to hold out?
7. **Selected Holdout Filtering:** (If #6 is ON) What field (e.g., a checkbox) will the rep use to designate opportunities they want to keep?

Holdout Expiration

Determine when the holdout expires and what will happen to the holdout and opportunities when the expiration occurs.

8. **Holdout Expiration Timeframe:** How long should the opportunity remain in the final holdout state? (in Days, Quarter, Half, Year)
9. **Expiration Action:** What happens if the opportunity is still open when the holdout expires?

(Select one: Assign to current account owner or Reassign to a specific role)

Updating Holdout Owners (Optional)

Designate ownership roles and members.

10. **Create Opportunity Team Members:** Should the holdout owner be added as a member of the Opportunity Team?
11. **Team Role:** If yes to above, what role should the new opportunity owner be given on the account team?

Updating Fields (Optional)

Specify which fields on the opportunity and holdout records to update, and what values to fill.

12. **Updating Fields:** What fields on the holdout and/or opportunity records would you like to update? Choose from values on either the holdout, policy status, or opportunity records.

Opportunity Splits (Optional)

Choose whether to allocate opportunity splits between the outgoing and new owners. Percent splits between outgoing owner and new owner must add up to 100

13. **Hold Out Start:** How is the split determined when the holdout begins? That is, if the deal closes during the holdout period
14. **Expiration/Transfer Split:** How is the split determined when the holdout expires or transfers?
15. I**mmediate Transfer Split:** How is the split determined if the opportunity is immediately transferred (not held out)?

Ineligible Opportunities

16. **Account Ownership:** What do you want to do with opportunities that end up being ineligible?
17. **Updating Holdout Owners:** For holdouts, do you want to create an opportunity team member? If so, what role will the holdout owner have on the opportunity team?
18. **Updating Fields :** List any Opportunity Fields that must be updated when this policy is applied.

Fallbacks & Defaults
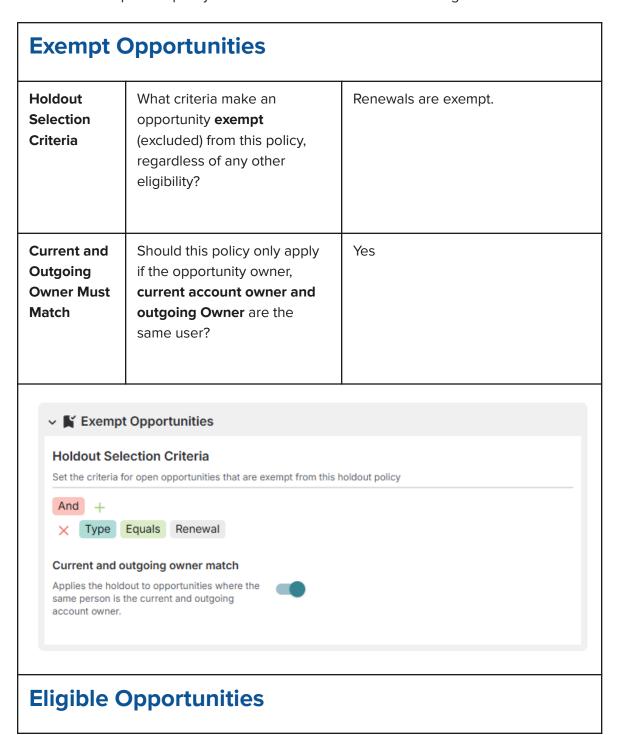
19. **Select Default User:** If something happens and we can't transfer the opportunity to the person according to the policy, who should we transfer it to?
20. **Multiple Ownership Changes:** If the account ends up changing hands after the holdout is created/starts, what do you want to do? (Keep existing holdout record OR overwrite the existing holdout.)

Example of Planning worksheet

EXAMPLE ✅ Holdout Policy Pre-Configuration Worksheet: Opportunity Management
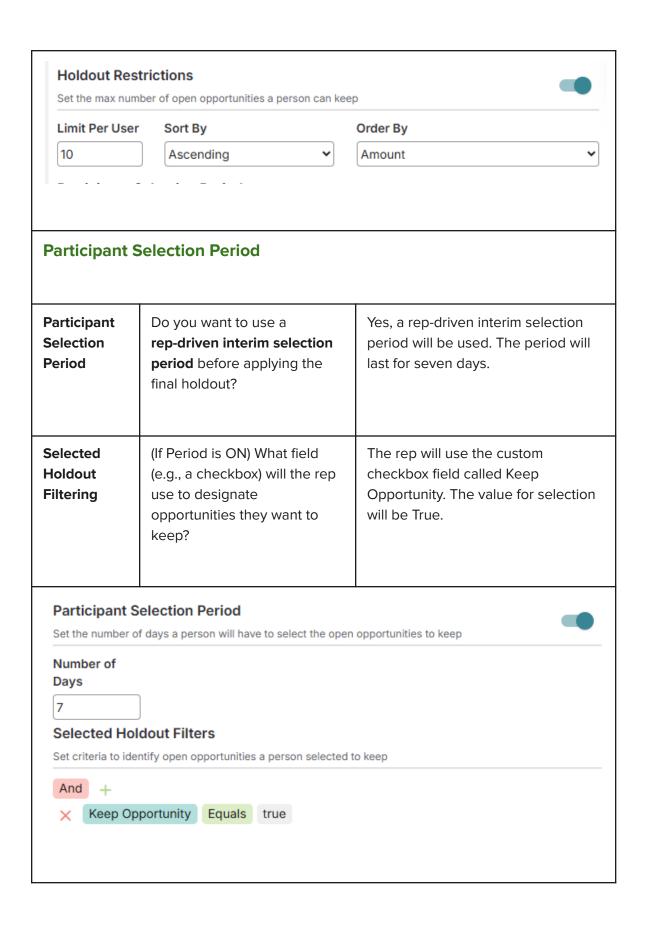
Here is an example of a policy written out and how it would be configured in Fullcast.

Exempt Opportunities

Holdout Selection Criteria	What criteria make an opportunity **exempt** (excluded) from this policy, regardless of any other eligibility?	Renewals are exempt.
Current and Outgoing Owner Must Match	Should this policy only apply if the opportunity owner, **current account owner and outgoing Owner** are the same user?	Yes

Eligible Opportunities

Holdout Selection Criteria	What criteria must an opportunity meet to be **eligible** for the automated holdout process? (Mandatory field.)	The opportunity type must not be a Renewal. The opportunity amount must be $50K or greater. The close date must be before June 30, 2026

Holdout Selection Criteria
Set the criteria for open opportunities eligible for the holdout policy

And +

✕ Type | Does not equal | Renewal

✕ Close Date | Is less than or equal to | 2026-06-30

✕ Amount | Is greater than or equal to | 50000

Holdout Restrictions

Holdout Restrictions	Do you need to **limit the total number of holdout opportunities** any single rep can possess at one time?	Yes, limit the total number of holdout opportunities to 10 per user.
Holdout Restrictions - Sort By and Order By	(If Limited) How should the system **Sort** and **Order** opportunities to decide which ones are **immediately transferred**?	The system should sort by the Opportunity Amount. The order should be the smallest value opportunity will be transferred first.

Holdout Restrictions

Set the max number of open opportunities a person can keep

Limit Per User	Sort By	Order By
10	Ascending	Amount

Participant Selection Period

Participant Selection Period	Do you want to use a **rep-driven interim selection period** before applying the final holdout?	Yes, a rep-driven interim selection period will be used. The period will last for seven days.
Selected Holdout Filtering	(If Period is ON) What field (e.g., a checkbox) will the rep use to designate opportunities they want to keep?	The rep will use the custom checkbox field called Keep Opportunity. The value for selection will be True.

Participant Selection Period

Set the number of days a person will have to select the open opportunities to keep

Number of Days

7

Selected Holdout Filters

Set criteria to identify open opportunities a person selected to keep

And +

× Keep Opportunity Equals true

Holdout Expiration

Holdout Expiration Timeframe	How long should the opportunity remain in the final holdout state? (in Days, Quarter, Half, Year)	The opportunity should remain in the final holdout state for forty-five days.
Expiration Action	What happens if the opportunity is **still open** when the holdout expires? (Select one) **Assign to current account owner** or **Reassign to a specific role?**	When the holdout expires, the opportunity should be assigned to the Current Account Owner.

Holdout Expiration

Set the timeframe when the holdout expires and the action taken on open opportunities after expiration

Hold out Expiration Timeframe   **Days**

| Number Of Days   ⌄ | | 45 |

◉ **Assign to current account owner**
  Assigns opportunities that are still open to the current account owner.

◯ **Assign to a role**
  Assigns opportunities that are still open to a person on the account team with the selected role.

Updating Holdout Owners

Create Opportunity Team	Should the holdout owner be **added** as a member of the Opportunity Team? If	Yes, the holdout owner should be added to the Opportunity Team.

Members		
Team Role	If yes to above, what role should the new oppty owner be	Account Executive

Update Holdout Owners
Enable the addition of owners as opportunity team members and assign a them to a role

Add Opportunity Team Members
Adds the new account owner to the opportunity team.

Account Executive

Update Fields (Optional)

Update Fields	Which fields on the opportunity to update, and what values to fill.	Update the opportunity status to indicate that it is currently in a holdout.

Update Fields
Select what fields to update when changes are applied to an open opportunity

Field	Value
Opportunity.Status	Fullcast Holdout Policy.Status

Opportunity Splits

		Current Owner	New owner
Hold Out Start	How is the split determined when the holdout **begins**? That is, if the deal closes during the holdout period	90	10
Expiration/Transfer Split	How is the split determined when the holdout **expires or transfers**?	25	75
Immediate Transfer Split	How is the split determined if the opportunity is **immediately transferred** (not held out)?	10	90

Opportunity Splits

Set the percentage split for opportunities that are transferred to new owners

Holdout Starts

Set the opportunity split for owners for opportunities at the time the holdout begins (amounts must equal 100%)

Current Owner Split	New Owner Split
90	10

Expired or Transferred

Set the opportunity split for owners when the holdout expires or opportunity transfers (amounts must equal 100%)

Current Owner Split	New Owner Split
25	75

Immediately Transferred

Set the opportunity split for owners when the opportunity is immediately transferred (amounts must equal 100%)

Current Owner Split	New Owner Split
25	75

Ineligible Opportunities

Account Ownership	What do you want to do with opportunities that end up being ineligible?	Assign to the Account Executive on the Account Team

Account Ownership

Select the action taken on ineligible open opportunities that are not exempt

○ **Assign to current account owner**
Assigns opportunities that are still open to the current account owner.

◉ **Assign to a role**
Assigns opportunities that are still open to a person on the account team with the selected role.

Select Role

Account Executive ▾

Updating Holdout Owners	For holdouts, do you want to create an opportunity team member? If so, what role will the holdout owner have on the oppty team?	

Update Holdout Owners

Enable the addition of owners as opportunity team members and assign a them to a role

Add Opportunity Team Members

Adds the new account owner to the opportunity team

Account Executive ▾

Updating Fields	List any Opportunity Fields that must be updated when this policy is applied.	Don't update any fields on opportunities that don't get holdouts.

Update Fields

Select what fields to update when changes are applied to an open opportunity

Field	Value
No fields added	

Fallbacks & Defaults

Select Default User	If something happens and we can't figure out who we're supposed to transfer the oppty to, who should we transfer it to?	Integration User

Select Default User

Select a default person the open opportunity will transfer to if the current person is not available.

Fullcast Integration User ⊗ ▾

Multiple ownership changes	If the account ends up changing hands after the holdout is created/starts, what do you want to do?	**Keep the existing holdout**

In the event of multiple ownership changes:

◉ **Keep the existing holdout**
The open opportunity will retain the original holdout regardless of ownership changes

◯ **Overwrite the existing holdout**
A new holdout will be applied for multiple ownership changes