Your Salesforce's Checklist

Here is the information you will need for each step in Salesforce.

In the case of a lead to qualify a first contact with a potential client

REQUIRED FIELDS TO CREATE A LEAD

- ☐ Last name
- ☐ First name
- ☐ Email
- ☐ Company
- → Account size *(this information is available in the Registraire des entreprises, if needed)*
  - ☐ Individual
  - ☐ Startup
  - ☐ Micro Company *(less than 10 employees)*
  - ☐ Small Company *(10 to 49 employees)*
  - ☐ Medium Company *(59 to 249 employees)*
  - ☐ Large Company *(more than 250 employees)*

REQUIRED FIELDS TO PERFORM THE INITIAL CONFLICT SEARCH

- ☐ Initial opportunity amount
- → Lead source
  - ☐ Not a referal
  - ☐ BCF employee
    ** If this field is selected, fill in the BCF Employee field*
  - ☐ Client
    ** If this field is selected, fill in the Client field*
  - ☐ Other reference
    ** If this field is selected, fill the Referral Contact*
  - ☐ BCF event
  - ☐ RFP/ Pitch
  - ☐ Website or cold call

At any time, you can access support tools

- at **bcf.ca/salesforce** Salesforce page or
- by contacting **salesforce@bcf.ca**

In the case of an opportunity to qualify a potential new file with an existing account

REQUIRED FIELDS TO CREATE AN OPPORTUNITY

- ☐ Account name
- ☐ Opportunity name *(can be anonymized if the file is confidential)*
- ☐ Opportunity close date *(estimated date this opportunity will close)*
- ☐ Opportunity currency *(CAD, EUR, USD)*
- → Opportunity recommended by
  - ☐ Not a referal
  - ☐ BCF employee
    ** If this field is selected, fill in the BCF Employee field*
  - ☐ Client
    ** If this field is selected, fill in the Referral Account and Contact field*
  - ☐ Other reference
    ** If this field is selected, fill the Referral Contact*
  - ☐ BCF event
  - ☐ RFP/ Pitch
  - ☐ Website or cold call
- ☐ Opportunity owner *(name of the professional)*

REQUIRED FIELDS TO MOVE FROM INTERACT TO PROPOSAL/NEGOTIATION

- → Cross sell potential
  - ☐ Yes
  - ☐ No
- ☐ Cross sell expertise *(if this filed is selected, choose one or more expertise)*
- ☐ Client potential annual revenue

REQUIRED FIELDS TO MOVE FROM PROPOSAL/ NEGOTIATION TO FINAL CONFLICT SEARCH

- ☐ Proposal amount

WHEN AN OPPORTUNITY IS NO LONGER ACTIVE, MANUALLY CHANGE ITS STATUS TO CLOSED/LOST

- ☐ Stage *(Default Closed/lost)*
- → Closed - reason:
  - ☐ Business conflict
  - ☐ Too expensive
  - ☐ Competitor offers more value
    ** If this field is selected, fill the Closed Lost – Winning Competitor field*
  - ☐ Failed client conflict check
  - ☐ Failed matter conflict check

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