**Account Naming Conventions and Guidance for linking Accounts to Opportunities**

**Linking Accounts to Opportunities**

* Use the **Account** field for the ultimate account, even if we are contracted by an intermediary account. The account we are contracted to should be entered under **Partner/Competitors** with the Role of Prime and the Primary button ticked.
* *Example: We are pursuing an opportunity with Shepherd Construction Limited to design a new facility for Rolls Royce. As the end client, Rolls Royce is the Account. Shepherd Construction should be entered in the Partners/Competitors related list with Role = Prime and with the Primary button clicked.*
* Use the Partners/Competitors to record any competitors we know about, or any accounts who we have on our team as subcontracts.
* *Example: We are pursuing an opportunity to design an Education Campus for University of Cambridge. We know Allies and Morrison will also be pursuing, so we add them to Partners/Competitors**with the Role = Competitor. We plan on having a local Ecology company on our team, and so add them also, with the Role = Subcontractor.*
* Sometimes we will create a joint venture (JV) with another company to bid for an opportunity. The company(ies) we are joining up with should be added to the opportunity record under Partners/Competitors with the Role = AECOM JV Partner
* *Example: We are pursuing an opportunity for a public square for the New York City Department of Planning. We have decided to team up with Skanska. We enter NY City Dept of Planning to the Account field on the opportunity, and add Skanska to the Partners/Competitors field with the Role = AECOM JV Partner*

* Sometimes we will be pursuing an opportunity where the client itself is part of a JV. On this occasion, we add all the companies comprising the JV into Partners/Competitors under the Role: Account’s JV Partner
* *Example: We are pursuing an opportunity where the client is made up of English Heritage, Dover District Council and Kent County Council. We would create a new Account record for them, and list all the parties under Partners/Competitors, with the Role = Account’s JV Partner*

**Naming Conventions**

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| **Account Group** | **Account Name** |
| **All Accounts** | 1. Use the spelling exactly as it appears on the client’s business card or letterhead or web site, and abbreviate only as shown there 2. Check to see if anyone has entered a profile already for the same client at a different address. If so, use that spelling 3. Enter in all caps only if the client’s official name is in all caps 4. Do not add acronyms (e.g.,  IDOT, MDEQ) in client name field; use separate **Alias** field, which is searchable when entering a client name in the search window 5. Always use spaces before/after ampersands  in client name, e.g., Brown & Brown, but no space with initials-only names: A&B Inc. 6. Avoid use of the following characters as they interfere with Oracle reporting: ! @ % | \ : ; “ ‘ ? / ` ~ 7. As all AECOM regions are on Salesforce, no projects should be assigned to an account with an AECOM name. The only exception is if we were to work for any of the offices in Australia and New Zealand, we they are the last region to migrate over. All other AECOM account records on Salesforce are in the process of being deleted. |
| **Accounts with multiple locations, districts or regions** | If you contract separately with the various districts or locations, they should be entered as individual account records. You can link them to the Main Office by choosing that in the Parent field. Add district or department as part of the Account name, with no separator. Do not add additional information such as “Parent Account” to the Account name, since the account name prints on mailing labels, project sheets, etc.. Example:  Illinois Department of Transportation Main Office  Illinois Department of Transportation District 1  Illinois Department of Transportation District 2  Illinois Department of Transportation District 3  Illinois Department of Transportation District 4 |
| **Municipal** (includes counties and regional utility authorities - any government entity smaller than a state or province) | 1. Account names start with the name of the city, town, village or state, followed by " , City of" or " , Town of” or " , Village of" 2. Do not include the state or province in the municipal account name 3. Use the county name followed by "County":  * Jackson County  1. Include the department in the account name (which eliminates the “City of”):  * Chicago Department of Aviation * London Department of Buildings  1. Note: the **Account Name for Labels** field automatically converts “Peoria, City of” to “City of Peoria”; you can produce reports or mailing labels using this field if you prefer |
| **States and Provinces** | Use the state or province and department or agency:   1. Manitoba Department of Conservation 2. California Environmental Protection Agency |
| **National Governments** | 1. Use the country name followed by the department or agency, when appropriate:  * US Department of Energy * Canada Department of the Environment   But:   * Parks Canada  1. Do not use periods in US client names. Do include the country whenever possible to reduce confusion. 2. For these accounts, use the following examples as guidelines  * US Air Force Center for Engineering and the Environment * US Air Force Plant 4 * US Army Corps of Engineers Baltimore * US General Services Administration * US Environmental Protection Agency - Region II * US Naval Facilities Engineering Command Mid-Atlantic * US Postal Service/USPS * US Air Force - Robins AFB * US Army Engineering Support Center, Huntsville * US Air Force School of Aerospace Medicine * US Department of Agriculture – US Forest Service * US Department of Energy – Oak Ridge National Laboratory  1. Other governments:    * Try to use a department: Libya Department of Environment    * Otherwise: Country, Government of |
| **Industrial-Commercial** | 1. Use the name of the Account following the client’s preference (as shown on web site, business card, or stationery 2. Remove commas from company names before Inc. and Ltd. 3. Use abbreviations for Incorporated, Limited, Joint Venture consistently, e.g., Inc., LLC, Ltd., JV 4. Incorporation and Company and Corporation in client name should be abbreviated as Co. and Corp. – with exceptions, following the client’s preference 5. For company names with initials, use periods but not spaces between initials, e.g., **A.D. Makepeace Company** 6. Do not use **The** in front of company name unless **The** is part of their legal name 7. Port Authorities – entered as **Port Authority of Vancouver** or **Port of Seattle** (not Vancouver, Port Authority of or Seattle, Port of) |

**Other**

For BC (British Columbia) client names, use legal name, e.g., British Columbia Ministry of Environment but BC Hydro.

Note: Salesforce has a field for Former Client Name

**Confidential and Classified Clients**

With the exception of military/defence related clients and opportunities, clients who wish to remain confidential should still be put into the CRM systems using their appropriate corporate entity name and the Client Confidentiality Agrmt in effect? field checked **Yes**. .

Certain military/defence pursuits require confidentiality for national security reasons and AECOM understands and supports this effort. These accounts are entered as “Classified Client” However, all Salesforce.com users have signed a Nondisclosure Agreement (NDA) within AECOM. An NDA is a legal document prohibiting the release, transmittal, or communication of any information within the CRM to entities outside of AECOM.

If a client specifically requests to not be included in the CRM system, please contact your local CRM administrator and provide justification as to why this must occur. By using “Confidential Client” as the account, the functionality and versatility of the CRM tool is greatly limited, duplicate records can be created, and thus, this account designation is highly discouraged.