**Salesforce Stage Definitions**

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| **Stage Name** | **Definition** | **Record Types** | **Treated as** |
| **1 Lead** | Opportunity identified, no decision on pursuing yet | All | Open |
| **1A Lead – Scout \*** |  | All | Open |
| **1B lead – Engage \*** |  | All | Open |
| **1C Lead – Position \*** |  | All | Open |
| **2 Capture \*** |  | All | Open |
| **2A Capture – LOI** | Request for letter of interest has been received and document is being prepared | All | Open |
| **2B Capture – EOI** | Request for expression of interest has been received and document is being prepared | All | Open |
| **2C Capture – SOQ** | Request for statement of qualifications has been received and document is being prepared | All | Open |
| **2D Capture – RFI** | Request for information has been received and document is being prepared | All | Open |
| **2E Capture – RFP** | Request for proposal has been received and proposal is being prepared | All | Open |
| **3 Submitted** | Proposal (or other document the client will use to make a decision) has been submitted | All | Open |
| **3A Capture – Proposal Submitted** | Proposal has been submitted | All | Open |
| **3B Capture – Short List** | Client has informed us that we have made the final cut; often followed by an interview to determine winner | All | Open |
| **3C Capture – Interview** | Client has requested that we appear for an interview | All | Open |
| **4 Project on Hold** | Client suspends the process for any reason | All | Open |
| **5 SNB/Win/Award** | AECOMhas been notified that we are the winner; negotiations in progress or waiting for final contract signature | Projects and Task Orders | Open |
| **5A Program in Negotiation** | AECOMhas been notified that we are the winner; negotiations in progress or waiting for final contract signature | Programs | Open |
| **5B Program Signed and Active** | Contract signed and we are currently in the period of performance | Programs | Closed |
| **6 Contracted/Booked/Won** | Contract signed and job opened in AECOM accounting system | Projects and Task Orders | Closed |
| **6A Program Closed/Completed** | Period of performance has ended, no further task orders will be assigned | Programs | Closed |
| **7 Canceled by Client** | Client dropped project due to lack of funding, political change, etc. | All | Closed |
| **8 No-Go** | AECOM decided not to proceed (may occur at any point in process) | All | Closed |
| **9 Lost** | Work was awarded to another firm | All | Closed |

\*This terminology comes from the STRT process. See the [STRT page](http://collaboration.aecomnet.com/salesandmarketing/bdnet/bl/Water/ProcessLeads/STRT/Pages/Manual.aspx) for more information on this.