**DealChicken Account Executive – Create New Account**

1 – Create SFDC Account

2 – Create EchoSign Account

3 – Create Radius Account

4 – Transfer Records (Accounts, Opportunities, Contacts, Leads) if needed

5 – Add To ‘DealChicken Feed’ Chatter Group

6 – Create KPI Rep record in Salesforce

**DealChicken Account Executive – Cancel Account**

1 – Get name of replacement/transfer to, if any.

2 – Check Agreements that are still ‘waiting for signature’ and check with manager to see what to do with them. Before cancelling echosign may need to complete signatures.

3 – Cancel SFDC, Radius, EchoSign

4 – Transfer Records that apply