

Pipeline Clean Up Awareness

	Rule
Rule Description	Existing opptys with Expected Ship Date > 6 mo old will be auto-set to close withdrawn in Chevron's CRM *
Job frequency	Daily or Weekly (TBD)
Start	Jan 1, 2022

Example: Assume Today's Date = Oct 1, 2021

1. Oppty 1 Expected Ship Date = Feb 1, 2021
Oct 1 – Feb 1 is greater than 6 months



Close
Withdrawn

2. Oppty 2 Expected Ship Date = Aug 1, 2021
Oct 1 – Aug 1 is less than 6 months



Keep/
No change

Notes:

- LMs on 2way CRM2CRM integration will have opptys auto set to closed-withdrawn in their CRM, if the oppty is set as such in Chevron's CRM.
- To help you reconcile differences in Chevron's CRM vs the LM's CRM, we'll add reporting to the First Source Dashboard which will help identify auto-closed opptys as well as any that are re-opened.
- New Community opptys that are created thru the CRM2CRM integration will not be subject to the "ESD in the past" validation but once in Chevron CRM, this "ESD>6 mo old" job will identify and auto close withdraw them each time it's run
- If a Community Oppty is edited by a user directly in mPower, a validation will check to ensure the ESD is a date in the future.
- If a Community oppty is edited thru the integration, it will not be checked for an ESD in the past
- We will not test for ESD in the past upon Lead conversion

Required Actions:

- ✓ Start cleaning up Expected Ship Dates in Dec
- ✓ Maintain Expected Ship Date in 2022 and ensure that opptys in the pipeline have Expected Ship Dates that are within 6 months of current date



FAQs

Question	Answer
Why is Chevron cleaning up the pipeline?	Maintaining a clean pipeline is the job of every seller. We'd like to ensure we have only real opportunities in the pipeline so we can focus on actions that will drive those forward and remove the noise from the data.
What happens if Chevron's CRM sets the Phase to Close Withdrawn on my oppty and then I modify another field on that oppty?	For those LMs on one-way sync, the CRM2CRM integration will pick up that new update as well as the phase value from the LM CRM. If the oppty in the LM CRM is "open" this will "re-open" the oppty in Chevron's CRM
What if my Expected Ship Date is in the past when the oppty is created?	Once validated, the oppty will get created in Chevron's CRM. But the clean up rule will auto-close withdraw the oppty if/when the Expected Ship Date is greater than 6 months old.
How will the auto-closure of opptys impact my Gap2Goal metric	It will affect the size of your pipeline which is used as a means of calculating your expected growth for the year. If a lot of your pipeline has very old Expected Ship Dates, then your pipeline will shrink, and the gap (if there is one) will grow



2-way sync LMs

- BRONCO OIL COMPANY INC
- DEAN'S BULK SERVICE
- GAUBERT OIL CO INC
- Greg's Petroleum
- H.N. FUNKHOUSER & CO
- HENDLEY ENTERPRISES, INC.
- Inlet Petroleum
- Holtzman Oil
- Nick Barbieri
- PORT CONSOLIDATED INC
- ROBT E CARSTENSEN INC
- W H Breshears
- WOODFORD OIL CO
- SANTMYER OIL CO., INC.
- KELLERSTRASS ENTERPRISES
- 49 North
- Hunt & Sons
- SENERGY PETROLEUM LLC
- Jubitz Corporation
- GARY V BURROWS INC
- PRIME LUBE, INC.
- HUFFMAN OIL COMPANY, INC.
- BURKETT OIL CO INC
- CAPITAL CITY OIL INC.
- SOUTHERN LUBRICANTS, INC.