

Salesforce Exporter Account Ratings

This system will help classify Exporter Account records, to optimize outreach efforts among BD Officers and O&E teams.



TIP: For exporter accounts that have been Referred To or are Closed Won, Salesforce will automatically assign a rating of 4 or 5 once they reach this status. No BD Officer manual updates are needed.

Rating: 0



Products are not USA-made, marked as “do not call, we will call you,” non-revenue producing, not exporting. These contacts may be better suited as referrals to partner organizations to become export ready.

Outreach:

O&E email workflow, BD Officer sends referral information

Rating: 1



Interested in EXIM products. Perhaps the company policy is to only export on cash in advance. Maybe timing isn't suitable (ie. selling to 1 customer in Canada and not concerned about financing or Export Credit Insurance).

Outreach:

O&E only email workflow

Rating: 2



Experienced in exporting and meets requirements. Initial contact has been made but not with the decision-maker; needs further consideration. Company has issued customer quotes but nothing official yet.

Outreach: O&E only email workflow

Rating: 3



Close to Opportunity referral. Company highly interested. BD Officer maintaining all contact. BD Officer able to use SF reports to track who needs a follow-up.

Outreach:

BD Officer has direct contact, no O&E email workflow



After 60 days of no activity, account rating of 3 reverts to 3b. Receives custom O&E nurturing

Rating: 4



Been referred to BAM/LAM (customer in hands of broker or lender). They are obtaining UEI. They are putting together an app package.

Outreach: Broker/Lender in direct contact, only receives O&E monthly newsletter and event invitations

Rating: 5



Closed Won Opportunity in SF. Email workflows to be cross selling and informational (ie. ECI was sold, therefore email workflow will be emails about WCG, MMIA, or CLS).

Outreach:

Primarily O&E only email workflow