

Process for Managing Client Account Acquisitions

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Follow the steps below then use this [link to make changes in Salesforce](#)

Standard Operating Procedure (SOP)

Initial Information Required for Customer Acquisitions

Purpose

To ensure acquisitions are processed accurately and efficiently, the following information must be obtained before evaluating or making any contractual, account, or billing changes.

Required Documentation

1. Proof of Acquisition

Obtain documentation that verifies the acquisition has been completed. Acceptable documentation includes, but is not limited to:

- Bill of Sale
- Asset Purchase Agreement
- Merger or Acquisition Agreement
- Other legal documentation confirming the purchase

2. Acquisition Details

Gather information on how the acquired company will operate after the acquisition. Confirm the following:

- Will the acquired company continue operating as it does today under new ownership?
- Will the acquired company be dissolved and fully absorbed into the purchasing company?
- Will there be a change to the company name or legal entity?
- Will any customer accounts, contracts, or billing information need to be updated?

Next Steps

Once the required documentation and operational details have been received, review the information to determine any necessary:

- Contract updates or assignments
- Customer account changes
- Billing modifications
- Legal entity updates

- System configuration changes, if applicable

Notes

Obtaining this information at the beginning of the process helps ensure all contractual, account, and billing impacts of the acquisition are identified before any changes are made, reducing delays and minimizing the risk of processing errors.