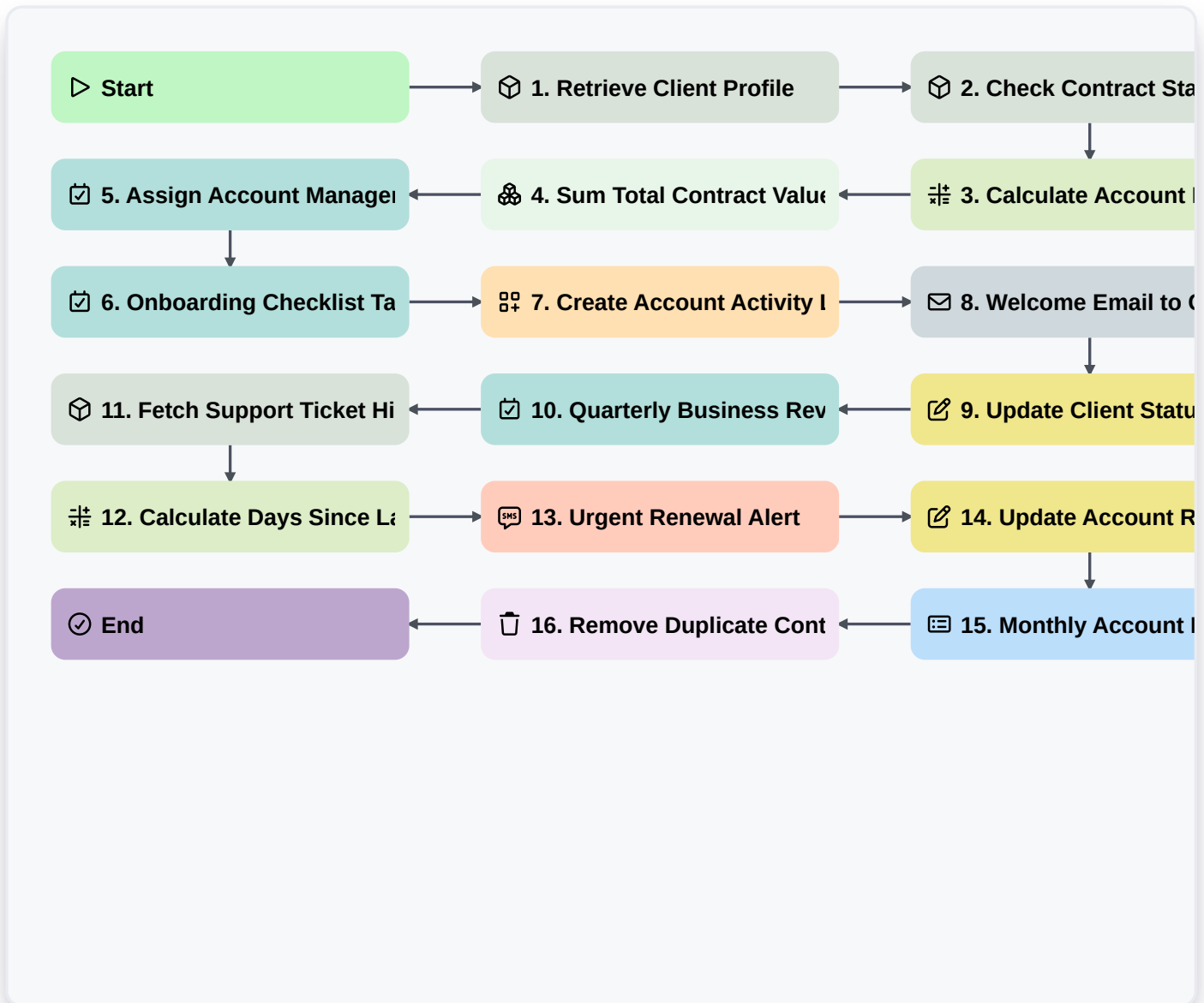


# Client Account Management Workflow



## ▷ Start

Start of the Workflow/Process.

## 📦 1. Retrieve Client Profile

Fetch existing client details from the Client Data Model to populate workflow context.

## 📦 2. Check Contract Status

Retrieve the specific Contract entry associated with the client to verify validity.

## 📊 3. Calculate Account Health Score

Compute a score based on recent support tickets, usage frequency, and payment history.

## 🔗 4. Sum Total Contract Value

Aggregate all active service line entries to calculate the total revenue from this client.

## ✅ 5. Assign Account Manager

Create a task for the Sales Operations user to assign a dedicated human lead to the account.

## ✅ 6. Onboarding Checklist Task

Create a task for the Success Team containing the standardized onboarding checklist.



## **7. Create Account Activity Log**

Generate a new entry in the Activity Log model to record the start of the management lifecycle.

## **8. Welcome Email to Client**

Send a personalized welcome email to the client contact person.

## **9. Update Client Status**

Update the 'Status' field in the Client Data Model from 'Prospect' to 'Active'.

## **10. Quarterly Business Review (QBR) Setup**

Create a recurring task to schedule the next strategic review meeting.

## **11. Fetch Support Ticket History**

Retrieve all recent support entries to identify potential churn risks.

## **12. Calculate Days Since Last Contact**

Calculate the delta between the current date and the 'Last Interaction Date' property.

## **13. Urgent Renewal Alert**

Send an SMS notification to the Account Manager if a contract is within 30 days of expiry.

## **14. Update Account Revenue Forecast**

Update the forecasted annual revenue entry based on new contract add-ons.

## **15. Monthly Account Health Report**

Generate a PDF/Dashboard report summarizing the client's engagement and usage metrics.

## **16. Remove Duplicate Contact**

Delete any redundant or duplicate contact entries identified during the cleanup phase.

## **End**

End of the Workflow/Process.