ACME CORPORATION

Appian

CUSTOMER RELATIONSHIP MANAGEMENT

Acme has a growing list of customers. As the sales department has expanded, information is no longer quickly shared from person to person. Acme needs a more central location to store information about clients and leads so that sales executives can quickly look up information about any potential customer.

- Account Managers need to view all information about the relationship with the client, including when contact is made to stay ahead of any problematic situations.
- In addition to being able to view information, an account manager also can add a new client and update client details. They should also be able to add details of interactions with each client.
- Any time a new client is added, Finance Specialists will have to add the billing account number.
- Executives need to be able to view client trends based on geographical areas and industries, but also see individual client relationships and details
- If a high-risk client is added to the system, executives will need to be notified.