

Annual Client Service Calendar

Workflow Template Steps

1	Beginning of Year Review
Priority:	High
Due:	3 days after workflow start or previous step completed
Assigned to:	Contact Owner
2	Mid-year Review
Priority:	High
Due:	120 days after workflow start
Assigned to:	Contact Owner
3	End of Year Review
Priority:	High
Due:	240 days after workflow start
Assigned to:	Contact Owner
4	MAINTENANCE: Start Next Year's Workflow Dated January 1
Priority:	High
Due:	15 days after previous step completed
Assigned to:	Contact Owner