

# Example Workflows

## Lead/Client Management:

- Automation of lead magnet opt-in sequence (create CRM contact, send email with download link, etc.)
- Automated management of CRM contact or email tags based on certain actions (clicking an email link, submitting a form, booking discovery call, etc.)
- Automated organization of client data collected from intake forms or applications and stored in CRM or project management tool
- Automated client communications such as notifications, progress reports, project updates, etc.

## Contracts and proposals:

- Automated custom proposals specific to client and project
- Auto-generated E-signature contracts pre-filled with client info
- Email follow-up sequence to remind clients about proposal/contract expirations or renewals
- Automated tracking of proposal/contract status in CRM

## Invoicing:

- Automated invoice generation and delivery with payment processing integration (PayPal, Stripe, Square, etc.)
- Automated payment reminders and late payment notifications
- Automated tracking and management of payment history

## Onboarding and Project Setup:

- Automated project creation and assignment of tasks, due dates, and project info in project management tool
- Automated setup of client portal and access to materials
- Automated welcome email containing onboarding materials (documents, links, portal access, etc.) for client
- Automated task workflows for new clients to track progress of onboarding

## Service Fulfillment:

- Post-meeting automation sequence (send summary email, manage recording, create action item tasklist, etc.)
- Automated delivery of training or educational materials during service fulfillment
- Automated management of tasks in project management tool

#### Offboarding and Follow-up:

- Auto-generated offboarding document or user guide
- Automated offboarding email containing offboarding materials (guides, links, exit survey, etc.)
- Automated dashboard that tracks and analyzes client feedback data
- Follow-up email sequence to collect testimonials and reviews
- Automated management of testimonials and reviews