

Case Study

Automating a Web Design Agency
Project Application Process

A quick message!

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About the Client

Our client is a web design agency creating custom websites & designs. They were overwhelmed with the amount of project applications they needed to sort through manually from several online platforms.

Before & After

Before: The team manually sifted through a high volume of project offers via email, a time-consuming task.

After: We automated the sorting of project offers into a Google Sheets list, neatly organized with AI-summarized key points, ready for quick follow-up.

Overview

Facing an overwhelming amount of project offers, the agency reached out to us to simplify the initial stages of their project application process.

Problem Statement

With project offers from several platforms coming in by email, the agency's manual approach to sorting and responding was unsustainable.

Objective

To create an automated system that quickly organizes project offers, allowing the agency to concentrate on crafting personalized responses.

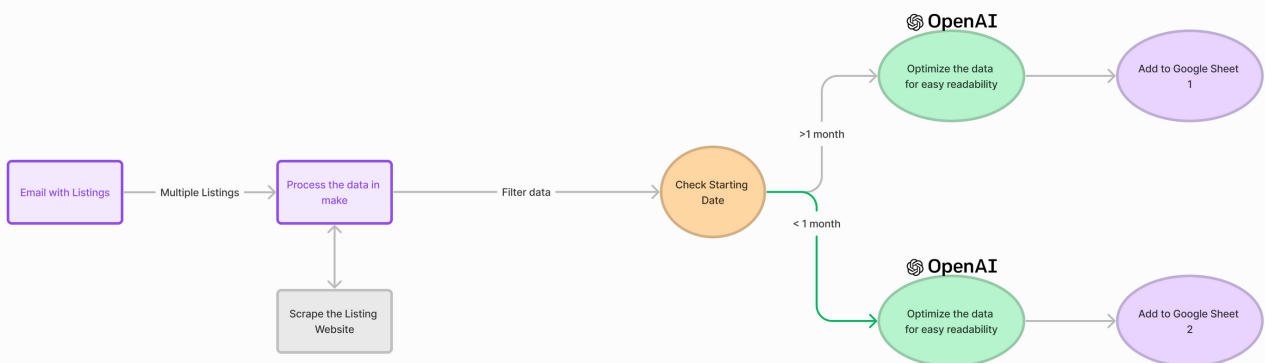
Solution Deployed

Initial Workshop: Conducted a workshop to understand the intricacies of the client's event management needs.

Roadmap Creation: Developed a clear roadmap for a new, automated process, which the client approved.

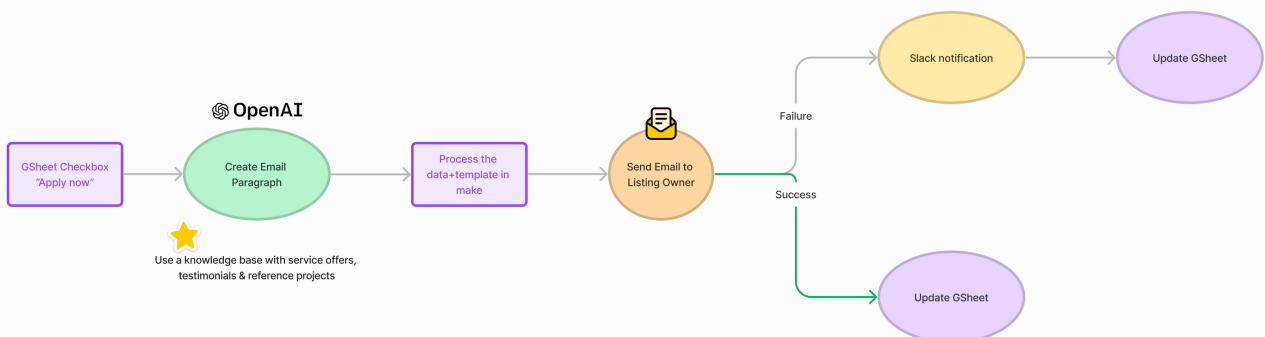
Trigger: E-Mail

Project Application Review Process



Trigger: GSheet Checkbox

Project Application Process



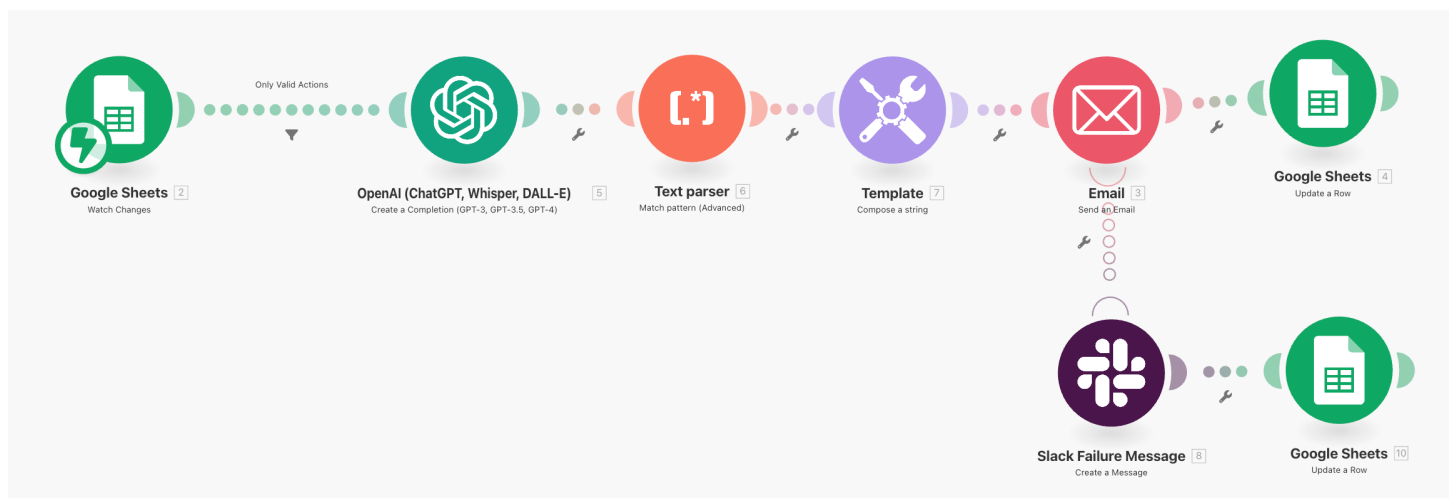
Automated Email Collection: Established a system to collect project offers from the agency's email. We scrape the actual project landing page for details & extract them.

AI Detail Extraction: Used AI to extract and condense important information from each project offer.

Google Sheets Listing: Set up a Google Sheets document that automatically fills with the AI-processed project data.

Response Templating: Made it easy for the agency to add personal touches to a response template.

Email Response Automation: Arranged for these personalized responses to be automatically sent to potential clients.



Results

The new system saves the agency countless hours previously spent on manual email sorting, enabling them to respond to project offers more quickly and with personalized attention.

Conclusion

With the new automated process, the web design agency now efficiently manages a larger volume of project inquiries, enhancing their productivity and ability to engage with more clients.

Marvin Aziz - webtotheflow.com

P.S.: If you haven't seen it yet, check out my video on [How We Automated Handling Content Across Multiple Platforms](#)

[& How my Client's Event Management Process got automated](#)

***Also:** [How we automated incoming invoices](#)*