

Engagement letter and proposal creation

Automatically generates customized engagement letters and service proposals for new client opportunities based on service type and client information. Streamlines the proposal process and ensures consistent, professional client communications.

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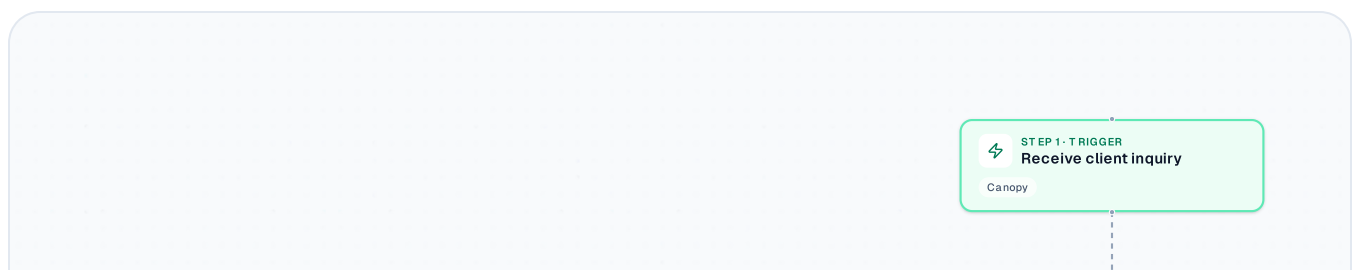


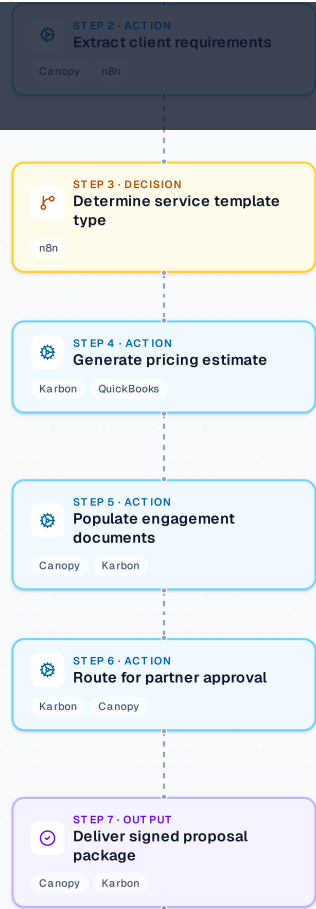
WORKFLOW TRIGGER

New client inquiry is received through CRM or prospect intake form

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive client inquiry

A new prospect submits an inquiry form or is entered into the CRM system requesting accounting services. Basic client information and service needs are captured.

2

 ACTION

Extract client requirements

Parse the inquiry to identify requested services (tax prep, bookkeeping, audit, etc.), entity type, and complexity indicators. Standardize the data for downstream processing.

Canopy

n8n

3

 DECISION

Determine service template type

Route to appropriate engagement letter template based on service type - individual tax, business tax, bookkeeping, or audit services. Each path has different pricing and scope templates.

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4

 ACTION

Generate pricing estimate

Calculate service fees based on client size, complexity factors, and firm's standard rate card. Pull historical data for similar engagements to ensure competitive pricing.

Karbon

QuickBooks

5

 ACTION

Populate engagement documents

Auto-fill engagement letter and proposal templates with client details, service scope, timeline, and calculated pricing. Include relevant terms and conditions for the service type.

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6

 ACTION

Route for partner approval

Send completed proposal to appropriate partner or manager for review and approval before client delivery. Include pricing justification and risk assessment notes.

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 OUTPUT

Deliver signed proposal package

Email the approved engagement letter and proposal to the prospect with e-signature capability. Create follow-up tasks and timeline in project management system.

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Outputs

- Customized engagement letter

- Service proposal with pricing

AI Business OS



Key Metrics

- Proposal turnaround time
- Proposal acceptance rate
- Average proposal value



Tools & Integrations

- Canopy
- Karbon
- QuickBooks
- n8n

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