

Client communication and progress updates

Automatically generates and sends customized project progress updates to clients based on milestone completion and project data. Ensures consistent communication while reducing manual administrative work for project managers.

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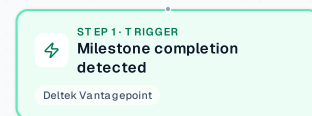


WORKFLOW TRIGGER

Project milestone marked as completed in project management system

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

Milestone completion detected

Workflow initiates when a project milestone is marked complete in the project management system. System captures milestone details, completion date, and associated project information.

2

 ACTION

Extract project progress data

Automatically pulls current project status, budget utilization, timeline adherence, and deliverable completion rates. Gathers team assignments and upcoming milestone information.

Deltek Vantagepoint

Monograph

3

 DECISION

Evaluate update requirements

Determines if client requires immediate notification based on milestone criticality, contract terms, and client communication preferences. Routes to appropriate communication channel.

BQE Core

4

 ACTION

Generate progress report

Creates customized progress update with project visuals, completion percentages, budget status, and next steps. Formats content based on client template preferences.

Newforma

Monograph

5

 ACTION

Schedule client communication

AI Business OS

Automatically sends progress update via client's preferred method (email, portal, or meeting request). Sets follow-up reminders for project manager if response required.

Newforma

BQE Core

6

 ACTION

Log communication record

Documents all client communications in project file with timestamps and delivery confirmations. Updates client interaction history for future reference.

Deltek Vantagepoint

Ajera

7

 OUTPUT

Update stakeholder dashboard

Refreshes real-time project dashboard with latest milestone completion and client communication status. Provides visibility to all team members and management.

Monograph

Unanet



Outputs

- Automated progress report sent to client

AI Business OS

- Updated project communication log
- Real-time stakeholder dashboard
- Follow-up task reminders for project manager



Key Metrics

- Client communication response time
- Project milestone completion rate
- Client satisfaction scores
- Administrative time savings per project



Tools & Integrations

- Deltek Vantagepoint
- Monograph
- BQE Core
- Newforma
- Ajera
- Unanet

AI Business OS

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