

# Client communication and approval processes

This workflow automates client design proposal delivery, feedback collection, and approval tracking to streamline communication and accelerate project approval cycles. It reduces manual follow-ups and ensures consistent client engagement throughout the approval process.

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## WORKFLOW TRIGGER

Design proposal is completed and ready for client review

## Visual Flow

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





## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Design proposal completed

A completed interior design proposal with 3D renderings, material specifications, and cost estimates is finalized in the design software. The

proposal status is automatically updated to trigger client communication.

## AI Business OS

SketchUp Chief Architect

2

 ACTION

### Generate presentation package

The system automatically compiles design renderings, floor plans, material boards, and project timeline into a branded PDF presentation. Interactive 3D walkthroughs are also prepared for client viewing.

Adobe Creative Suite

SketchUp

3

 ACTION

### Send proposal to client

An automated email with the design package is sent to the client through the project management platform. The system schedules follow-up reminders and tracks email engagement metrics.

Houzz Pro

4

 DECISION

### Evaluate client response type

The system analyzes client feedback to determine if it's an approval, revision request, or no response. Different automated workflows are triggered based on the response classification.

Houzz Pro

5

 ACTION

### Process revision requests

If revisions are requested, the system creates task assignments for designers and updates project timelines. Clients receive acknowledgment of their feedback with revised delivery dates.

Houzz Pro

Chief Architect

6

 ACTION

## Update project status

Project management system is automatically updated with approval status, next phase milestones, and team notifications. Contract generation is initiated for approved proposals.

Houzz Pro

7

 OUTPUT

## Generate approval documentation

Final approval certificates, updated project timelines, and next phase communications are automatically generated and distributed to all stakeholders.

Houzz Pro

Adobe Creative Suite



## Outputs

- Client approval status report

## AI Business OS

- Revised design proposals with tracked changes
- Automated project phase progression notifications



### Key Metrics

- Client response time
- Proposal approval rate
- Revision cycle duration



### Tools & Integrations

- SketchUp
- Chief Architect
- Adobe Creative Suite
- Houzz Pro

## AI Business OS

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