

# Client intake and consultation scheduling

Automates the complete client onboarding process from initial inquiry to scheduled consultation, including lead qualification, design brief collection, and calendar coordination. Streamlines client intake while ensuring proper project scoping and resource allocation.

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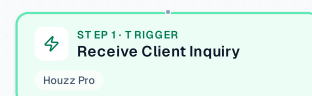


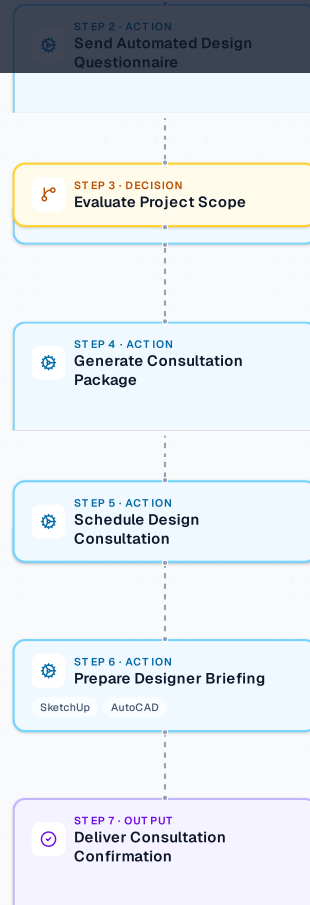
## WORKFLOW TRIGGER

New client inquiry submitted through website form or Houzz Pro lead capture

## Visual Flow

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





Alpha Creative Suite

## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Receive Client Inquiry

New potential client submits project inquiry through website contact form or Houzz Pro platform. System captures basic project details, contact

information, and initial requirements.

## AI Business OS

Houzz Pro

2

 ACTION

### Send Automated Design Questionnaire

Automatically emails comprehensive design brief questionnaire covering space dimensions, style preferences, budget range, and timeline expectations. Includes link to upload inspiration images and floor plans.

Adobe Creative Suite

3

 DECISION

### Evaluate Project Scope

Reviews questionnaire responses to determine project complexity and budget alignment. Routes high-value residential projects to senior designers and smaller commercial projects to junior team members.

4

 ACTION

### Generate Consultation Package

Creates personalized consultation packet with design portfolio samples, service offerings, and preliminary space planning concepts. Tailors content based on client's stated style preferences and project type.

Adobe Creative Suite

SketchUp

5

 ACTION

### Schedule Design Consultation

Sends calendar booking link with available time slots based on designer availability and project complexity requirements. Automatically blocks appropriate consultation duration and sends meeting confirmations.

6

 ACTION

## Prepare Designer Briefing

Compiles client responses, uploaded materials, and project notes into designer briefing document. Creates preliminary space analysis using uploaded floor plans or room dimensions.

SketchUp

AutoCAD

7

 OUTPUT

## Deliver Consultation Confirmation

Sends final consultation confirmation with meeting details, preparation checklist for client, and preliminary design concepts. Ensures both client and designer are fully prepared for productive first meeting.

Adobe Creative Suite



## Outputs

- Qualified lead with completed design brief
- Scheduled consultation appointment

## AI Business OS



### Key Metrics

- Lead response time
- Consultation booking conversion rate
- Client preparation completion rate



### Tools & Integrations

- Houzz Pro
- Adobe Creative Suite
- SketchUp
- AutoCAD

## AI Business OS

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