

Client consultation scheduling and follow-up

Automates the entire client consultation process from initial inquiry to follow-up, ensuring no potential landscaping projects are missed while maintaining consistent communication standards.

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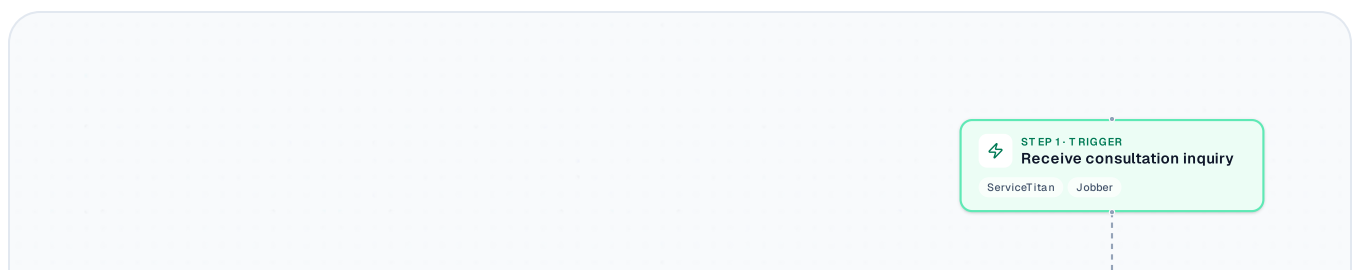


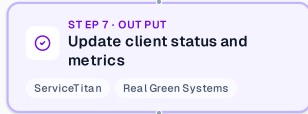
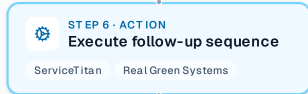
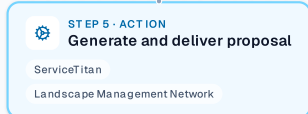
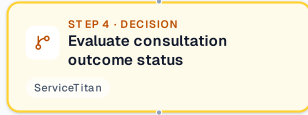
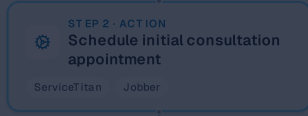
WORKFLOW TRIGGER

New landscaping inquiry received through website form, phone call, or referral

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

Receive consultation inquiry

System captures new client inquiry with contact details, property address, and initial landscaping needs. Data is automatically parsed and validated for completeness.

2

 ACTION

Schedule initial consultation appointment

System checks crew availability and automatically books consultation slot based on client preferences and technician route optimization. Confirmation details are sent to both client and assigned consultant.

ServiceTitan

Jobber

3

 ACTION

Send pre-consultation preparation materials

Automated email sequence delivers property assessment checklist, portfolio examples, and preparation instructions to client 24-48 hours before scheduled visit.

ServiceTitan

LawnPro

4

 DECISION

Evaluate consultation outcome status

System determines next action based on consultation result: quote requested, needs more time, not interested, or ready to proceed with project.

ServiceTitan

5

 ACTION

Generate and deliver proposal

AI Business OS

For interested clients, system creates detailed landscaping proposal with pricing, timeline, and design mockups, then automatically sends via email with tracking enabled.

ServiceTitan

Landscape Management Network

6

 ACTION

Execute follow-up sequence

Automated follow-up emails and calls are scheduled at optimal intervals based on proposal value and client engagement level to nurture leads toward conversion.

ServiceTitan

Real Green Systems

7

 OUTPUT

Update client status and metrics

Final client status is recorded in CRM with detailed consultation notes, next steps planned, and conversion probability scored for sales pipeline reporting.

ServiceTitan

Real Green Systems



Outputs

- Scheduled consultation appointment

- Customized landscaping proposal

AI Business OS



Key Metrics

- Consultation-to-quote conversion rate
- Average proposal response time
- Client follow-up engagement score



Tools & Integrations

- ServiceTitan
- Jobber
- LawnPro
- Landscape Management Network
- Real Green Systems

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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