

Client reporting and analytics dashboards

Automatically generates comprehensive client performance reports by collecting data from multiple marketing platforms and delivering customized dashboards on a scheduled basis. Reduces manual reporting time by 80% while ensuring clients receive consistent, data-driven insights.

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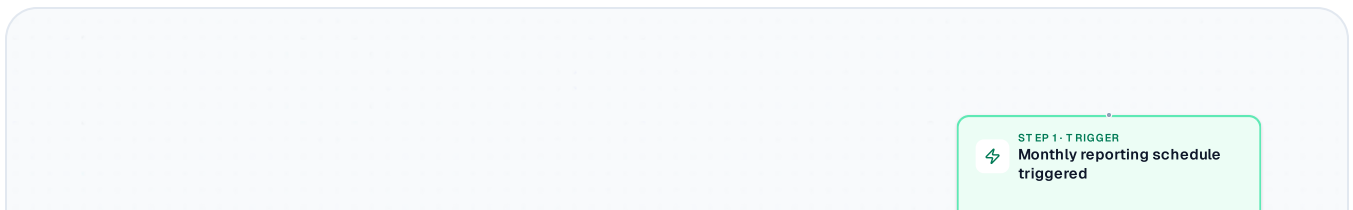


WORKFLOW TRIGGER

Monthly reporting date arrives (scheduled trigger on the 1st of each month)

Visual Flow

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





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HubSpot, Monday.com

Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Monthly reporting schedule triggered

Workflow initiates automatically on the first day of each month to begin client reporting process. System identifies all active clients requiring

2

 ACTION

Extract campaign performance data


Pulls comprehensive marketing metrics including traffic, conversions, keyword rankings, and social media engagement from all connected platforms. Data is normalized and prepared for analysis.

Google Analytics

SEMrush

Hootsuite

3

 ACTION

Retrieve CRM and project data

Gathers lead generation metrics, deal pipeline status, and project milestone completion rates from CRM and project management systems. Combines sales and marketing performance data.

HubSpot

Asana

4

 DECISION

Evaluate campaign performance thresholds

Analyzes if key metrics meet predefined client goals and SLA benchmarks. Determines whether to generate standard report or flag underperforming campaigns for additional commentary.

n8n

5

 ACTION

Generate customized client reports

AI Business OS

Creates branded PDF reports and interactive dashboards tailored to each client's KPIs and preferences. Includes executive summaries, detailed metrics, and actionable recommendations.

HubSpot

Google Analytics

6

 ACTION

Schedule client presentation meetings

Automatically books review meetings with clients based on their preferred schedule and sends calendar invites with report previews. Notifies account managers of upcoming presentations.

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7

 OUTPUT

Deliver reports and notifications

Distributes finalized reports via email to client stakeholders and uploads to client portals. Sends internal notifications to account teams with performance summaries and meeting schedules.

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Outputs

- Branded PDF performance reports

AI Business OS

- Interactive client dashboards
- Scheduled review meetings
- Internal team notifications



Key Metrics

- Report generation time reduction
- Client satisfaction scores
- Meeting attendance rates



Tools & Integrations

- n8n
- Google Analytics
- SEMrush
- Hootsuite
- HubSpot
- Asana
- Monday.com

AI Business OS

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