

# Project management and resource allocation

Automatically allocates team members and resources to new client projects based on skills, availability, and workload, then sets up project tracking and client reporting. Optimizes resource utilization while ensuring proper project setup and monitoring.

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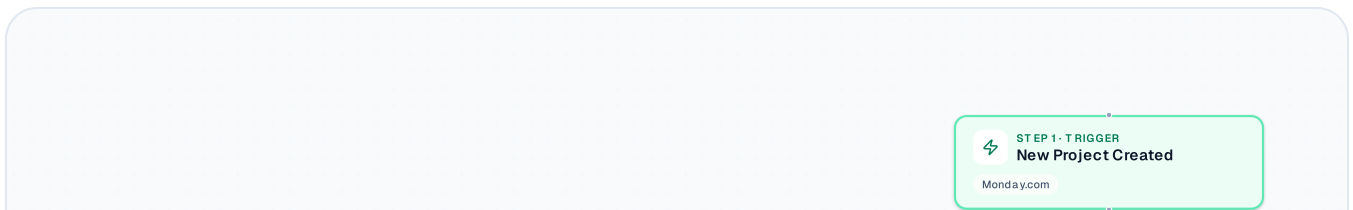


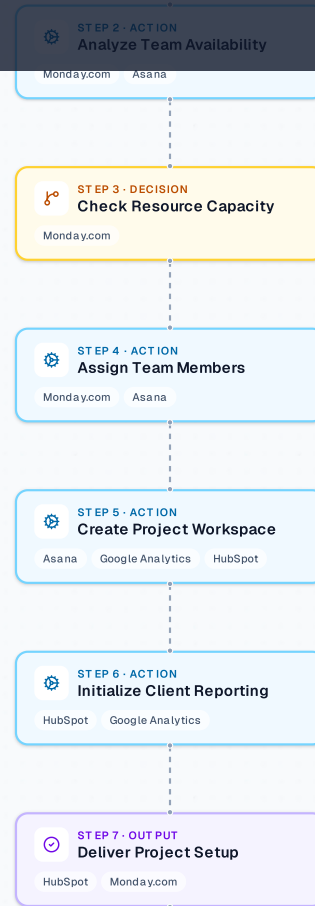
## WORKFLOW TRIGGER

New client project is created 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

### New Project Created

A new client project is added to the project management system with basic details like scope, timeline, and required skills. This triggers the automated

2

 ACTION

### Analyze Team Availability

System pulls current workload data for all team members and identifies available capacity based on existing project commitments. Calculates optimal resource allocation windows.

Monday.com

Asana

3

 DECISION

### Check Resource Capacity

Determines if sufficient internal resources are available for the project timeline and scope. Routes to different allocation strategies based on capacity levels.

Monday.com

4

 ACTION

### Assign Team Members

Automatically assigns team members to project roles based on skills matching and availability. Updates individual workload calendars and project rosters.

Monday.com

Asana

5

 ACTION

### Create Project Workspace

## AI Business OS

Sets up dedicated project workspace with task templates, milestone tracking, and client communication channels. Integrates analytics tracking for campaign performance monitoring.

Asana

Google Analytics

HubSpot

6

 ACTION

### Initialize Client Reporting

Creates automated client reporting dashboard with relevant KPIs and sets up scheduled report delivery. Configures project communication workflows in CRM.

HubSpot

Google Analytics

7

 OUTPUT

### Deliver Project Setup

Sends project kickoff notification to assigned team members and client with workspace access, timeline, and reporting schedule. Project is ready for execution with full resource allocation.

HubSpot

Monday.com



### Outputs

- Fully staffed project with assigned team members

- Configured project workspace with tracking

## AI Business OS



### Key Metrics

- Resource utilization rate
- Project setup time
- Team allocation accuracy



### Tools & Integrations

- Monday.com
- Asana
- HubSpot
- Google Analytics

## AI Business OS

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

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