

Client communication and follow-up sequences

This workflow automatically manages client communication from initial estimate through project completion, sending targeted follow-ups and collecting feedback to improve customer retention and generate referrals.

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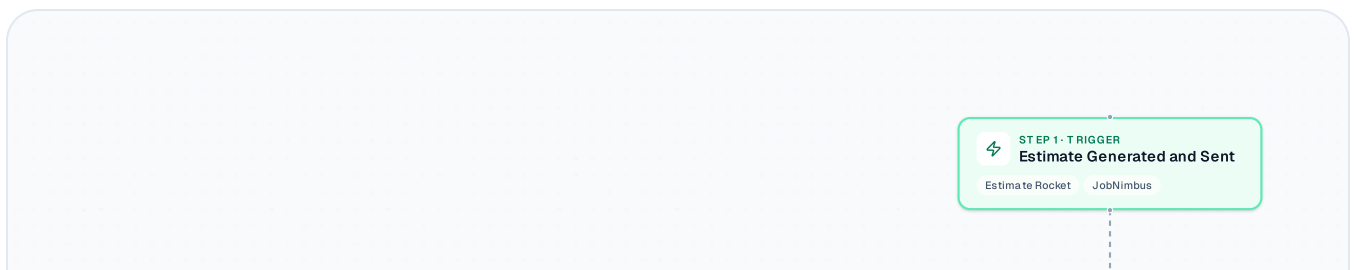


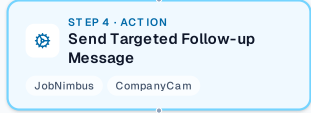
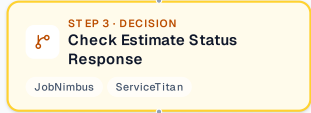
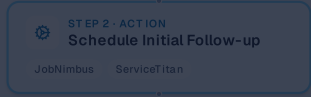
WORKFLOW TRIGGER

New estimate is generated and sent to potential client

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

Estimate Generated and Sent

A new painting estimate is created and automatically sent to the client. This triggers the automated communication sequence.

Estimate Rocket

JobNimbus

2

 ACTION

Schedule Initial Follow-up

Automatically schedules follow-up communications at 3 days, 1 week, and 2 weeks after estimate delivery. Creates tasks in project management system.

JobNimbus

ServiceTitan

3

 DECISION

Check Estimate Status Response

Evaluates if client has responded to estimate or requested modifications. Routes to appropriate communication path based on response type.

JobNimbus

ServiceTitan

4

 ACTION

Send Targeted Follow-up Message

Delivers personalized follow-up based on client response status - proposal modifications, scheduling availability, or gentle reminder with project benefits. Includes relevant project photos from similar work.

JobNimbus

CompanyCam

5

Update Project Timeline

Automatically updates crew scheduling and material ordering timelines based on client acceptance. Coordinates with BuilderTREND for project sequencing.

BuilderTREND

ServiceTitan

6

ACTION

Send Completion Survey

Dispatches post-project satisfaction survey and requests online reviews 2 days after job completion. Includes before/after photos from the project.

CompanyCam

JobNimbus

7

OUTPUT

Generate Communication Report

Creates comprehensive report showing response rates, conversion metrics, and client satisfaction scores. Identifies opportunities for referrals and repeat business.

ServiceTitan

JobNimbus



Outputs

AI Business OS

- Automated follow-up email sequences
- Updated project schedules
- Client satisfaction reports
- Referral opportunity alerts



Key Metrics

- Estimate-to-contract conversion rate
- Average response time to follow-ups
- Client satisfaction score
- Referral generation rate



Tools & Integrations

- JobNimbus
- Estimate Rocket
- ServiceTitan
- CompanyCam
- BuilderTREND

AI Business OS

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