

Client communication and status updates

Automatically generates and sends personalized client status updates based on project milestones and time tracking data, ensuring consistent communication while reducing manual administrative work.

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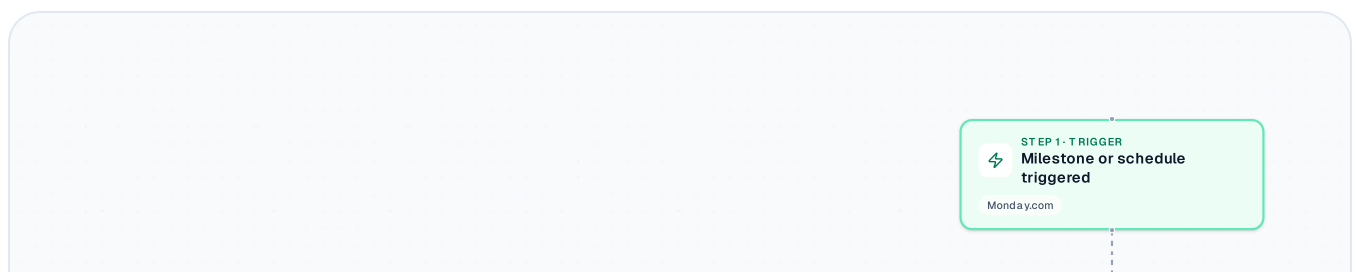


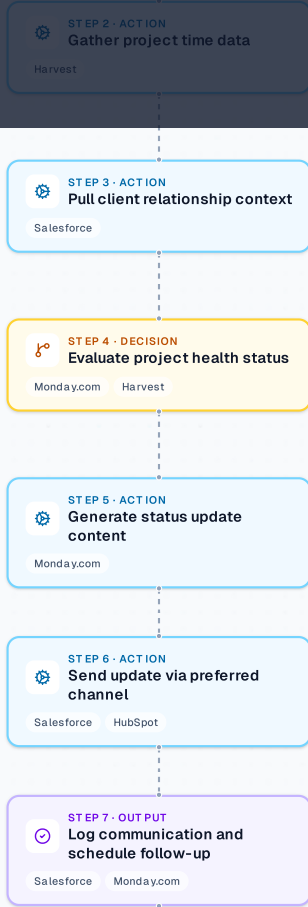
WORKFLOW TRIGGER

Project milestone completed or weekly status update scheduled

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

Milestone or schedule triggered

Workflow initiates when a project milestone is marked complete in Monday.com or when a scheduled weekly update is due.

Monday.com

2

 ACTION

Gather project time data

Retrieves billable hours, team member activities, and task completion rates for the specific client project from time tracking system.

Harvest

3

 ACTION

Pull client relationship context

Fetches client contact preferences, communication history, and account details to personalize the update format and content.

Salesforce

4

 DECISION

Evaluate project health status

Analyzes if project is on track, behind schedule, or ahead of schedule based on time utilization and milestone completion rates.

Monday.com

Harvest

 ACTION

5 **Generate status update content**

AI Business OS

Creates personalized status report including progress summary, next steps, budget utilization, and any required client actions or approvals.

Monday.com

6

 ACTION

Send update via preferred channel

Delivers the status update through client's preferred communication method and logs the interaction in CRM for tracking.

Salesforce

HubSpot

7

 OUTPUT

Log communication and schedule follow-up

Records the sent update in client history and automatically schedules the next status update based on project timeline.

Salesforce

Monday.com



Outputs

- Personalized client status update sent
- CRM communication record created

- Next status update scheduled

AI Business OS



Key Metrics

- Client communication frequency
- Time spent on status reporting
- Client satisfaction scores



Tools & Integrations

- Monday.com
- Harvest
- Salesforce
- HubSpot

AI Business OS

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