

# Project planning and resource allocation

Automatically creates project plans, allocates resources, and sets up tracking systems when new client projects are won in the sales pipeline. Reduces project setup time from days to hours while ensuring optimal resource utilization.

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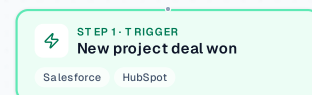


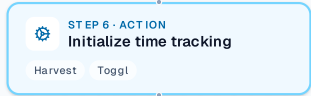
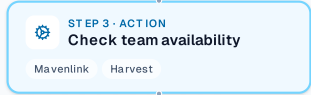
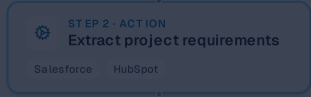
## WORKFLOW TRIGGER

Deal status changes to 'Won' in Salesforce or HubSpot CRM

## 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

## New project deal won

A sales opportunity is marked as won in the CRM system. Project details, timeline, and budget information are captured from the deal record.

Salesforce

HubSpot

2

 ACTION

## Extract project requirements

Parse deal data to identify project scope, required skill sets, estimated hours, and client deliverables. Map these requirements to standardized project templates.

Salesforce

HubSpot

3

 ACTION

## Check team availability

Query resource management system to identify available team members with matching skills during the project timeline. Calculate current utilization rates for potential assignees.

Mavenlink

Harvest

4

### Evaluate resource capacity

Determine if sufficient skilled resources are available within the project timeline. If capacity is insufficient, flag for manual intervention or suggest alternative timelines.

[Mavenlink](#)

5

 ACTION

### Create project workspace

Generate new project in project management system with tasks, milestones, and assigned team members. Set up time tracking categories and budget allocations.

[Monday.com](#)[Mavenlink](#)

6

 ACTION

### Initialize time tracking

Create project codes and billing categories in time tracking system. Configure automated time capture rules and billing rates for assigned team members.

[Harvest](#)[Toggl](#)

7

 OUTPUT

### Deliver project kickoff package

Send project plan, resource assignments, and kickoff meeting details to project team and client. Update CRM with project tracking links and key milestones.



## Outputs

- Fully configured project workspace with tasks and timelines
- Resource assignments with skill-matched team members
- Active time tracking setup with billing categories
- Project kickoff package delivered to stakeholders



## Key Metrics

- Project setup time reduction
- Resource utilization rate
- Time from deal won to project kickoff
- Project profitability forecast accuracy



## Tools & Integrations

- Salesforce
- HubSpot
- Mavenlink

- Harvest

## AI Business OS

- Toggl

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