

← Back to Wedding Planning **WEDDING PLANNING · WORKFLOW**

Client inquiry and lead qualification

This workflow automatically captures and qualifies wedding planning inquiries, scoring leads based on budget and timeline criteria to prioritize high-value prospects for immediate follow-up.

Download PDF

Get Your Blueprint

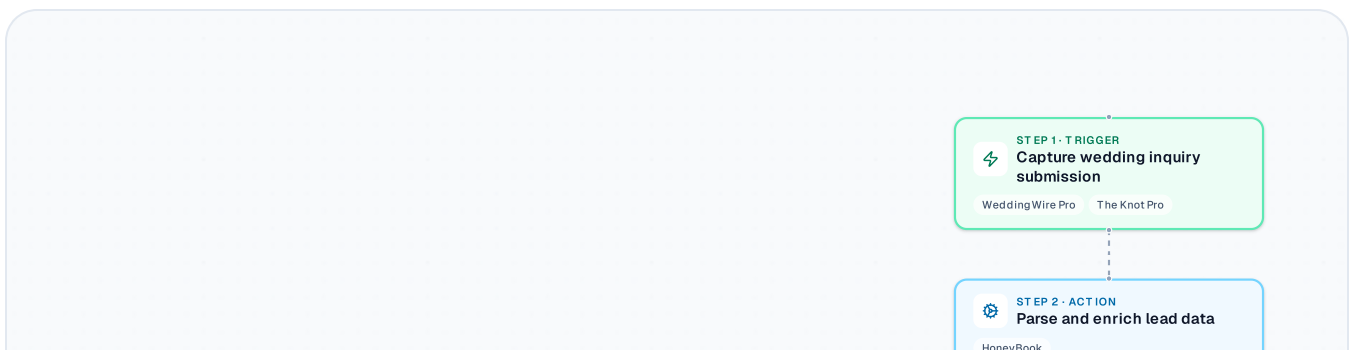


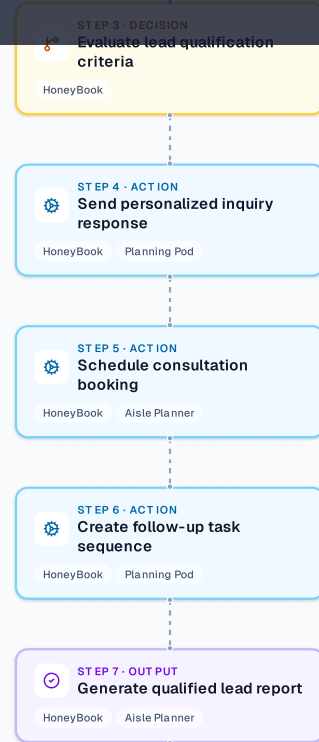
WORKFLOW TRIGGER

Potential client submits inquiry form through website or wedding platform

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

Capture wedding inquiry submission

New lead inquiry is received through website contact form, WeddingWire, or The Knot with basic wedding details. Initial lead data including contact info, wedding date, venue preferences, and estimated budget is collected.

WeddingWire Pro

The Knot Pro

2

 ACTION

Parse and enrich lead data

Extract key information from inquiry including wedding date, guest count, budget range, and location. Automatically populate lead profile with available social media and contact details.

HoneyBook

3

 DECISION

Evaluate lead qualification criteria

Score lead based on budget threshold, timeline feasibility, and service alignment. High-scoring leads meeting minimum budget and timeline requirements are flagged for priority handling.

HoneyBook

4

 ACTION

Send personalized inquiry response

Generate and send customized email response based on lead score and wedding details. Include relevant portfolio pieces, pricing guides, and next steps tailored to their specific needs.

5

 ACTION

Schedule consultation booking

For qualified leads, automatically send calendar link for consultation scheduling with appropriate time slots. Create preliminary client record and wedding project in planning system.

HoneyBook

Aisle Planner

6

 ACTION

Create follow-up task sequence

Set automated reminder tasks for planner team based on lead priority level. High-priority leads get immediate alerts while others enter nurture sequence with scheduled touchpoints.

HoneyBook

Planning Pod

7

 OUTPUT

Generate qualified lead report

Produce summary report of lead qualification status, assigned priority level, and recommended next actions. Update CRM with complete lead profile and timeline for future follow-up.

HoneyBook

Aisle Planner



Outputs

- Qualified lead profile with priority score
- Personalized inquiry response email
- Scheduled consultation appointment
- Lead qualification report with next actions



Key Metrics

- Lead qualification rate
- Response time to inquiries
- Consultation booking conversion rate



Tools & Integrations

- WeddingWire Pro
- The Knot Pro
- HoneyBook
- Planning Pod
- Aisle Planner

AI Business OS

AI Business OS

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

COMPANY

[About](#)

[Industries](#)

CONNECT

[MVP.dev](#)

[LinkedIn](#)

RESOURCES

[Articles](#)

