CASE STUDY

STREAMLINED CLIENT ONBOARDING & COMMUNICATION

BUILDING SEAMLESS WORKFLOWS WITH GOOGLE APPS SCRIPT.

Are new enquiries falling through the cracks or piling up, costing you precious time?
Let's create a system that handles initial responses, organises client files, and even tracks invoices all automatically.
At Empower Virtual Assistant Services, we don't just tackle your everyday admin; we build bespoke solutions that truly transform your workflow. Here's a real-world example of how we can supercharge your client management:

CHALLENGE

Many growing businesses and self-employed professionals struggle with managing new client enquiries efficiently. This often means:

- Delayed responses to potential clients, especially out of hours.
- Time-consuming manual data entry into spreadsheets.
- Disorganised client files scattered across different platforms.
- Forgetting to follow up promptly, leading to lost opportunities.

RESULTS

Your Empowered Business Implementing this kind of automation means:

- Enhanced Client Experience: Immediate, professional responses keep potential clients engaged.
- Significant Time Savings: No more manual data entry, folder creation, or chasing invoices.
- Unrivalled Organisation: All client data and documents are consolidated in one easily accessible, digital location.
- Reduced Stress & Overwhelm: You gain peace of mind knowing your initial client interactions are handled automatically and efficiently, freeing you up to focus on delivering your core services.
- Scalability: As your business grows, this system effortlessly scales with you, managing increased client volume without increasing your admin burden.

SOLUTION

Our Bespoke Automation Solution: We design and implement custom Google Workspace automations that take the heavy lifting out of client onboarding and communication. For one client, we created a seamless system that achieved this:

- Instant Enquiry Capture: When a potential client completes your website contact form, their details (name, email, phone, message) are automatically captured and logged into a dedicated Google Sheet. This becomes your centralised client relationship tracker.

- Smart Auto-Response: The system intelligently checks the time and day. If an enquiry comes in outside of your working hours (e.g., after 6 PM, weekends, or public holidays), the client immediately receives a friendly, personalised email acknowledging their message and setting expectations for when you'll respond during business hours. No more frantic checking emails late at night!

- Automated Task Creation: To ensure no enquiry is ever missed, the system automatically adds a "Follow Up" task to your Google Calendar for the very next working day at 10 AM. This gives you a clear reminder and ensures timely engagement.

- Instant Client Folder Creation: As soon as a new enquiry hits your Google Sheet, a dedicated, professionally named client folder is automatically created in your Google Drive.

- Pre-Populated Documents: Crucially, this new client folder is instantly populated with your essential business documents – your Terms & Conditions and Privacy Policy templates – ready for use. It also includes blank Quote and Invoice templates, making it effortless to generate new documents for each client, all within their organised folder.

- Integrated Invoice Management: This system seamlessly connects to your invoicing process. Track all work within a central sheet, and with a simple action, trigger the automation to generate accurate, professional invoices, save them to the client's dedicated Drive folder, and even email them directly to your clients.

SERVICES PROVIDED

- Automated Client Data Capture & Logging: Setting up systems to automatically collect new client information from forms and organise it into a central database (like a Google Sheet).
- Intelligent Automated Email Responses: Crafting and implementing email automations to send timely, personalised replies to new enquiries, including out-of-hours communication.
- Automated Follow-Up Task Generation: Configuring your systems to automatically create and assign follow-up tasks or calendar reminders for new leads, ensuring no enquiry is missed.
- Streamlined Client Folder Creation: Developing and deploying automated processes for generating dedicated, organised client folders in cloud storage (e.g., Google Drive).
- Automated Document Template Deployment: Ensuring essential client documents like Terms & Conditions, Privacy Policies, Quotes, and Invoices are automatically copied into new client folders, ready for immediate use.