Case Study

SiriusFlow

AT A GLANCE

An advanced AI automation workflow transforms client onboarding for a marketing firm, enhancing efficiency and client satisfaction.

Key metrics

Dramatic improvements in query management efficiency:

40%
reduction in onboarding time

20%
increase in client satisfaction

25%
overall cost savings

PAIN POINTS

A marketing firm approached us to streamline their client onboarding process through AI automation. Before implementing the AI automation solution, the client struggled with:

- Delays and errors in manual transcription of Zoom calls.
- Time-consuming and inconsistent proposal creation and data entry.
- Delayed onboarding process and inefficient communication.
- Redundant tasks causing client dissatisfaction.

SOLUTION

The automation solution utilized the tools the client was already using, including:

Zoom   Drive   GPT   Panda Doc

Trello   Slack   Gmail

BENEFITS

1 **Benefits One**
Reduction in onboarding time and significant reduction in manual tasks

2 **Benefits Two**
Improved accuracy in transcriptions, data entry, and proposal generation

3 **Benefits Three**
Streamlined onboarding process with enhanced client experience

4 **Benefits Four**
Consistent and professional onboarding experience with clear communication and timely project details
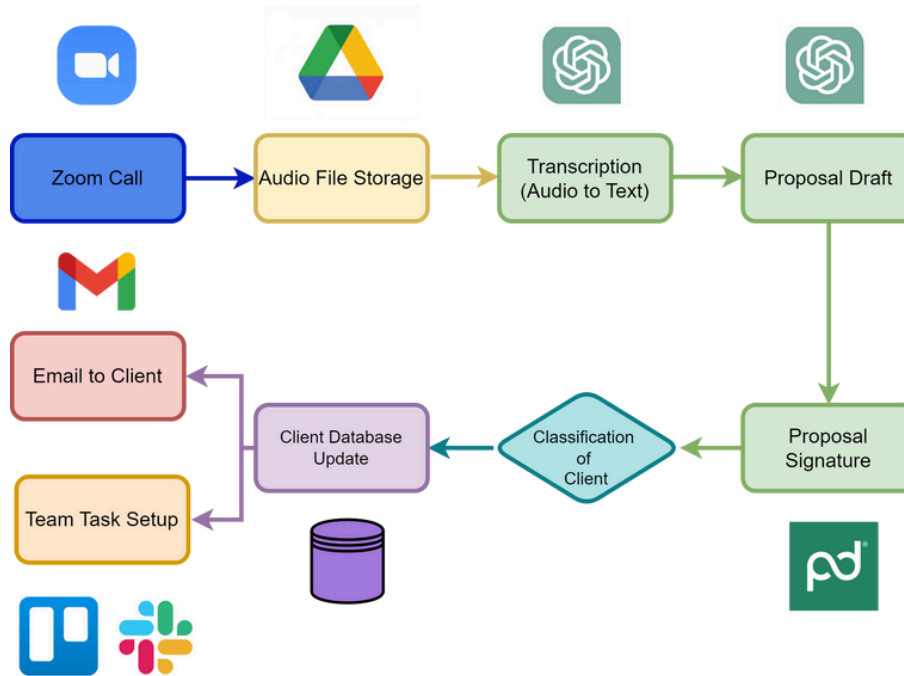
www.siriusflow.com

contact@siriusflow.com

Automation Workflow

Zoom Call → Audio File Storage → Transcription (Audio to Text) → Proposal Draft

Email to Client ← Client Database Update ← Classification of Client ← Proposal Signature ← Proposal Draft

Team Task Setup ← Client Database Update

APPROACH

- **AI Transcription:** Implemented AI to transcribe Zoom calls accurately and efficiently, reducing errors and saving time previously spent on manual transcription.

- **Text Analysis:** Utilized AI to analyze transcriptions and extract key information, ensuring consistent and accurate data extraction for subsequent processes.

- **Proposal Automation:** Automated the creation, review, sending, and tracking of customized proposals, streamlining the process and reducing inconsistencies.

- **Onboarding Triggers:** Automated onboarding initiation upon proposal acceptance for timely and seamless client transitions

- **Data Entry Automation:** Reduced errors and time spent on manual data entry by implementing automated data entry and verification processes, enhancing accuracy.

- **Project and Task Setup**: Automatically set up projects and assigned tasks to relevant team members, ensuring efficient project management and task allocation.

- **Client Communication:** Sent automated welcome emails and follow-up reminders for clear communication and timely client engagement during onboarding.

Ready to revolutionize your business processes with AI-powered automation?

Contact Us Today

for a free consultation and discover how we can streamline your operations, boost efficiency, and enhance customer satisfaction.

contact@siriusflow.com

www.siriusflow.com