

## Streamlining Operations for Perth-Based Moving Company

### AT A GLANCE

Comprehensive AI-assisted automation solution integrates multiple platforms to streamline lead processing and job management for a small moving company in Perth, Australia.

#### Key metrics

Substantial improvements in operational efficiency:



**70%**

reduction in time spent on data entry



**52%**

increase in lead response time



**30%**

improvement in deal conversion

### BACKGROUND

A small moving business based in Perth, Australia approached us for a custom automation solution to efficiently process leads received via email. Before implementing the AI automation solution, the client struggled with:

- Repetitive tasks and data redundancy
- Delayed responses and led to lost leads

### SOLUTION

We developed a new AI-assisted automation solution that centralized workflow management through Trello and synchronized data across multiple platforms. The solution used the following tools:



Air  
Table



GPT



Trello



Slack



Calendar

### BENEFITS

1

#### Benefits One

Significant reduction in manual data entry and repetitive tasks

2

#### Benefits Two

Improved lead tracking and customer acquisition process

3

#### Benefits Three

Enhanced team communication and task visibility

4

#### Benefits Four

Automated synchronization across multiple platforms (Airtable, Google Calendar, Slack)

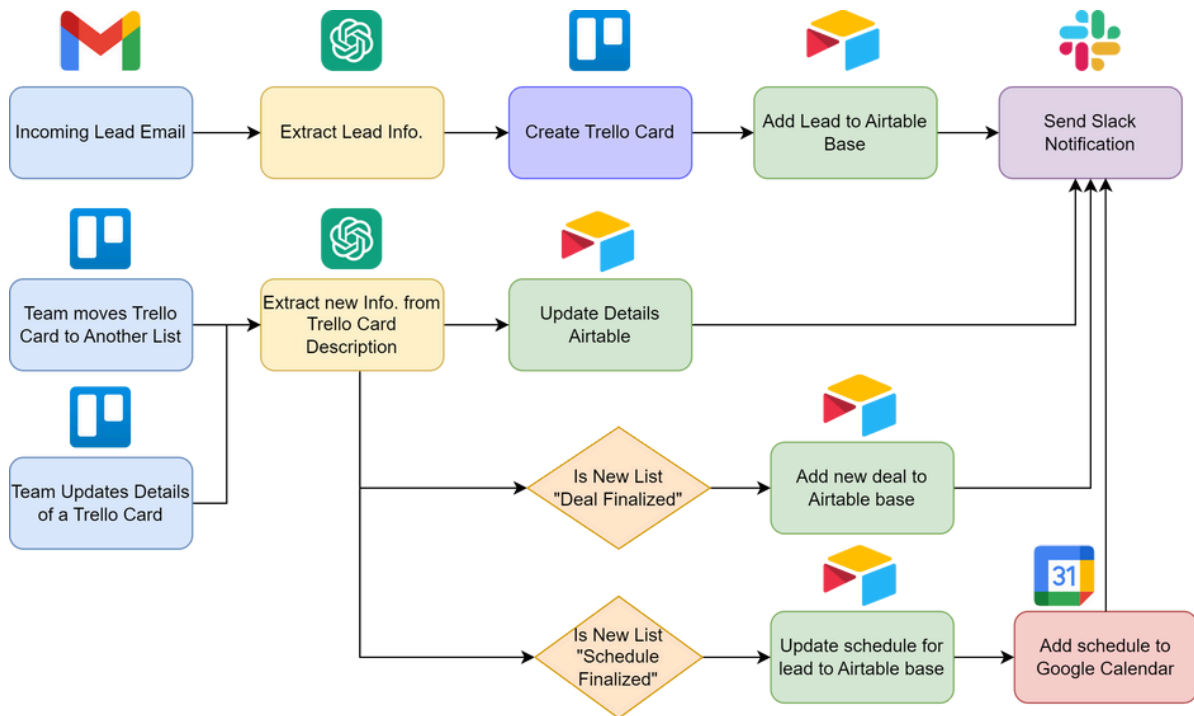


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## Automation Workflow



## APPROACH




- **Email Processing Automation:**
  - Developed system to extract lead information from incoming emails
  - Automatically populated a table in Airtable base with new lead data
  - Created corresponding Trello tasks and Slack notifications
- **Trello-Centric Workflow:**
  - Designed Trello board with stages: New Leads, Contact Made, Negotiating, Deal Closed, Job Scheduled, Job Completed
  - Implemented system for automatic status updates across platforms based on Trello card movements
- **Multi-Platform Integration:**
  - Connected Trello, Slack, Airtable, Google Calendar, and Gmail
  - Ensured seamless data flow and updates between all platforms
- **Automated Updates:**
  - Implemented automatic updates to a table in Airtable base upon deal closure
  - Created system for automatic Google Calendar entries when jobs are scheduled

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.

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