

AUTOMATION WORKFLOWS & TEMPLATES

Core automation flows:

A) Instant lead reply (all funnels)

- Trigger: Catering inquiry form submit or phone lead
- Action: SMS + Email auto-reply

SMS: "Thanks for contacting [Restaurant]. We got your request. Expect a phone call within 1 hour. Reply
Email: "Thanks - next steps, menu PDF, pricing ranges, link to schedule a tasting"

B) Corporate Lead Nurture (7-touch)

- Day 0: Instant reply + Pricing PDF
- Day 2: Case study (client testimonial)
- Day 7: Sample menu personalization email + calendar link
- Day 14: Promo (first-order discount)
- Day 30: Check-in + ask for feedback

C) Wedding Lead Flow

- Immediate: Bridal packet + prices + tasting invite
- Day 3: Portfolio gallery + sample timelines
- Day 7: SMS to schedule tasting
- Post-event: Feedback + referral ask (discount on anniversary dinner)

D) HOA / Senior Living Sales Flow

- Send sample menus for large groups, dietary accommodations
- Offer monthly tasting for HOA managers (free small tasting for decision-maker)
- Quarterly check-in automation with seasonal menus

E) Ghost Kitchen Rental Flow

- Automated booking calendar for kitchen rental hours
- Contract generation (signed PDF)
- Payment collection + insurance upload requirement

Suggested tools + triggers:

- Forms: BentoBox / Typeform (embed)
- CRM: HubSpot / HoneyBook
- SMS: Twilio or integrated SMS via POS/CRM
- Email automation: Mailchimp / HubSpot