🚀 New Age AI – Free Workflow Toolkit

Part 1: Client Workflow

1. **Inquiry**
   📩 Fill out our form & book a call.
   ⏱️ Response within 24 hours.
2. **Discovery Call**
   🎯 30-min call to understand your goals & challenges.
   ✅ We recommend the right AI solution.
3. **Proposal**
   📑 Tailored proposal with pricing & timeline.
   ✍️ Sign-off moves us to onboarding.
4. **Onboarding**
   📁 Project folder & communication channel created.
   📧 Kickoff email sent.
5. **Execution**
   ⚙️ We design, build & refine your AI workflow.
   🔄 Regular updates via weekly syncs.
6. **Delivery**
   📦 Final workflow handed over with SOP + documentation.
   🛠️ All bugs resolved before handover.
7. **Feedback & Growth**
   💬 Share feedback via form.
   🚀 Explore upgrades, retainers, or case study features.

Part 2: Workflow Development

Step 1: Build in Sandbox
🛠️ Create automations in a test-safe space.
👉 Use test accounts/environments without affecting real data.
👤 Owner: Automation Specialist
📦 Output: Sandbox setup complete

Step 2: Record Loom for Internal Test
🎥 Create a walkthrough video of the workflow.
👉 Use Loom, highlight logic & flow triggers, keep under 5 mins.
👤 Owner: Team Member
📦 Output: Loom link

Step 3: Internal Review & Feedback
👥 Get feedback before finalization.
👉 Share Loom + test credentials with peer or QA for review.
👤 Owner: QA / Peer Reviewer
📦 Output: QA notes received

Step 4: Finalize SOP/Handbook
📘 Create process documentation.
👉 Use SOP template & store in Notion or Drive.
👤 Owner: Project Manager (PM)
📦 Output: Document uploaded & linked in tracker