

✅ Trigger: Status = Done & Stage = Completed"

- Watches for status change in Notion CRM to trigger the feedback request.



👤 Request Client Feedback (Post-Project)

- Sends a friendly follow-up asking for feedback using a short Google Form. Personal and appreciative tone.



Gmail

send: message

No Operation, do nothing1

Trigger: Monthly Feedback Summary

Runs automatically on the 30th of every month at 9 AM to analyze all client feedback for that month.



Get Feedback Data from Google Sheet

- Pulls all responses from the feedback form sheet submitted by clients throughout the month.



Prepare Raw Feedback JSON

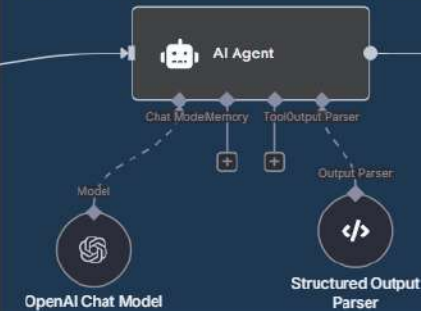
Processes all rows into structured format and stores them in a variable (feedback) for AI input.



Summarize & Rate Feedback (AI)

Uses GPT to:

- Extract positive themes
- Highlight results or wins
- Identify suggestions or complaints
- Pick strong testimonials
- Rate overall performance (out of 5)
- Give a monthly rating (Need Improvement, Okay, Good, Excellent)



Log Monthly Stats to Chart Sheet

Appends summary data (Month, Rating, Performance) to a tracking sheet that powers visual reports.



Generate Monthly Report in Notion

Saves a detailed feedback summary in your Notion database:

- Themes
- Results
- Suggestions
- Rating + Monthly performance
- Link to feedback chart

