Category -- Client Management / Scheduling Automation

Detailed Description

This automation intelligently manages client meeting bookings using Google Forms, Google Sheets, and Google Calendar. It eliminates the manual process of creating and updating calendar events whenever a new booking form is submitted.

When a client fills out a booking form, their response is automatically stored in Google Sheets. The automation watches this sheet for new rows and immediately checks whether an event for that client (based on date, time, or email) already exists in Google Calendar.

If the event already exists, the automation updates the event details (such as date, time, or description).
If the event does not exist, it creates a new event automatically, ensuring your calendar is always up to date.

This dynamic setup prevents duplicate bookings, ensures accurate meeting times, and keeps client communication consistent.
The use of Google Calendar's native notification system guarantees timely reminders for both the host and client before the meeting.

How It Works (Functionality)

Trigger

- Google Sheets – Watch Rows:
  The scenario triggers automatically whenever a new row (form response) is added to the connected Google Sheet.

Actions

1. Google Calendar – Search Events:
   The automation searches for an event using the client's reason for the meeting to check if a booking already exists.

2. Conditional Logic (Router):

   o If Event Exists:
     → Google Calendar – Update Event with the new information (time change, name update, etc.).

   o If Event Does Not Exist:
     → Google Calendar – Create Event with the details from the form (client name, email, date, time, and purpose).

3. Reminder Notification:
   Google Calendar automatically sends reminders to both parties based on default or configured

notification times (e.g., 10 or 30 minutes before).

Tools Required

- Google Forms – For collecting client booking information.

- Google Sheets – Stores form responses for triggering automation.

- Google Calendar – For event creation and notifications.

- Make.com (formerly Integromat) – To connect and automate the workflow between tools.

Size of Project

Medium (4 tasks)

- Trigger: Google Sheets watch rows

- Action 1: Google Calendar search events

- Action 2: Conditional router

- Action 3: Update or create event

Setup Requirements

1. Create a Google Form with fields for:

   o Client Name

   o Email Address

   o Meeting Date

   o Meeting Time

2. Link the form to a Google Sheet (responses tab).

3. In Make.com:

   o Set Google Sheets → Watch Rows as the trigger.

   o Add Google Calendar → Search Events using date/time or email as search criteria.

   o Use a Router to split paths:

     ▪ If event found → Update Event.

     ▪ If no event → Create Event.

   o Map all necessary fields (title, date, email, description).

4. Test the workflow by submitting a new form.

5. Turn on scheduling to run automatically every minute or in real time.

Deployment Time Estimate

- Without customization: 1–2 hours

- With advanced logic or multiple calendars: 3–4 hours

Value Proposition

This automation saves up to 5–7 hours per week for professionals handling client meetings, especially consultants or service providers.
It eliminates double bookings, ensures timely updates, and keeps clients informed automatically.

Estimated time savings:
~25–30 hours per month
Cost savings (at $25/hour): ~$625/month

Known Limitations

- Requires consistent event naming or email matching for accurate updates.

- Google Calendar's API limit is 10,000 requests/day per user.

- The workflow assumes only one event per client per day (can be modified).

Testimonials/Use Cases

- Used by coaches and consultants to automatically schedule and reschedule client sessions.

- Agencies use it to synchronize discovery calls and project kickoffs.

- Freelancers use it to keep track of multiple client meetings without manual entry.

Size Classification

Medium Automation (3–6 tasks)

Estimated ROI

Formula: (Hours saved × Hourly rate) − Subscription cost
= (25 hours × $25) − $0 (Google + Make Free Tier)
= $625/month ROI

Version & Updates

- v1.0 – Base setup: Watch new rows → Search → Create or Update event.

- v1.1 (Planned) – Add email confirmation to client when event is created/updated.

- v1.2 (Future) – Add dynamic reminder customization per client.