Photography Agency Sales Funnel Process for n8n Workflow

Overview

This process outlines a complete sales funnel for a photography agency, from initial lead capture through project completion and final payment. Each step includes specific triggers, actions, and data flows for n8n workflow automation.

Workflow Steps

1. LEAD CAPTURE & INITIAL RESPONSE

Trigger: Typeform submission **Data Required:** Name, Email, Phone, Event Type, Event Date, Budget Range, Additional Details

Actions:

- Capture form data from Typeform webhook
- Store lead information in variables
- Send immediate greeting email via email service (Gmail/Outlook)
- Create new task in ClickUp with status "New Lead"

Email Template - Greeting:

```
Subject: Thank you for your photography inquiry, [Name]!

Hi [Name],

Thank you for reaching out! We're excited about the possibility of capturing
your [Event Type].

We'll be in touch within 24 hours to discuss your vision and next steps.

Best regards,

[Company Name]
```

ClickUp Task Creation:

- Task Name: "[Name] - [Event Type] Photography"
- Status: "New Lead"
- Priority: Normal
- Custom Fields: Event Date, Budget, Phone, Email
- Description: Form submission details

2. DISCOVERY CALL SCHEDULING

Trigger: 30-minute delay after initial response **Actions:**

- Send Calendly scheduling email
- Update ClickUp status to "Scheduling Call"

Email Template - Calendly:

```
Subject: Let's schedule your photography consultation, [Name]

Hi [Name],

I'd love to learn more about your [Event Type] and discuss how we can bring
your vision to life.

Please select a convenient time for a 30-minute discovery call: [Calendly
Link]

Looking forward to speaking with you!
```

3. POST-CALL PROCESSING

Trigger: Calendly meeting completed webhook **Actions:**

- Update ClickUp status to "Call Completed"
- Generate call summary (manual input or AI integration)
- Create and send customized proposal
- Set follow-up reminder for 3 days

Call Summary Fields:

- Event details and requirements
- Budget confirmation
- Specific client requests
- Proposal amount
- Timeline requirements

4. PROPOSAL GENERATION & DELIVERY

Actions:

- Generate PDF proposal with:
  - Event details
  - Package inclusions
  - Timeline
  - Investment amount
  - Terms and conditions
- Send proposal email with PDF attachment

- Update ClickUp status to "Proposal Sent"

Email Template - Proposal:

Subject: Your custom photography proposal - [Event Type]

Hi [Name],

It was wonderful speaking with you about your [Event Type]!

Please find attached your customized photography proposal.

I'm excited to potentially work with you and capture these special moments.

The proposal is valid for 14 days. Please let me know if you have any questions!

5. PROPOSAL FOLLOW-UP

Trigger: 3 days after proposal sent (if no response) **Actions:**

- Send follow-up email
- Update ClickUp with follow-up note

Follow-up Email:

Subject: Following up on your photography proposal

Hi [Name],

I wanted to follow up on the proposal I sent for your [Event Type].

Do you have any questions or would you like to discuss any adjustments?

I'm here to help make this perfect for your special day!

6. PROPOSAL ACCEPTANCE & PAYMENT

Trigger: Client accepts proposal (email reply or form submission) **Actions:**

- Update ClickUp status to "Proposal Accepted"
- Generate Stripe payment link for deposit (typically 50%)
- Send payment instructions email

Payment Email:

Subject: Next steps - Securing your photography date

Hi [Name],

Fantastic! I'm thrilled you've chosen us for your [Event Type].

To secure your date, please complete the deposit payment: [Stripe Payment Link]

Once received, I'll send your complete onboarding package.

7. PAYMENT PROCESSING & ONBOARDING

Trigger: Stripe payment successful webhook **Actions:**

- Update ClickUp status to "Deposit Received"
- Create Google Drive folder structure
- Create Slack channel for communication
- Send onboarding kit email
- Schedule contract signing

Google Drive Folder Structure:

```
[Client Name] - [Event Date]
├── 01_Planning
├── 02_Inspiration
├── 03_Raw_Photos
├── 04_Edited_Photos
├── 05_Final_Delivery
└── 06_Contracts
```

Slack Channel Setup:

- Channel name: "[client-name]-[event-type]"
- Add team members
- Set channel purpose

Onboarding Email:

```
Subject: Welcome to the team! Your photography onboarding kit
Hi [Name],
Welcome aboard! Here's everything you need to get started:
- Google Drive folder: [Drive Link]
- Slack channel for communication: [Slack Link]
- Pre-shoot questionnaire: [Form Link]
Your event is officially in our calendar for [Event Date]!
```

8. PRE-EVENT REMINDERS

Trigger 1: 3 days before event date **Trigger 2:** 1 day before event date

Actions:

- Send reminder emails
- Update ClickUp status to "Event Approaching"

3-Day Reminder:

Subject: Your photography session is in 3 days!

Hi [Name],

Just a friendly reminder that your [Event Type] photography is scheduled for [Date] at [Time].

Location: [Venue Address]

Please confirm if anything has changed with timing or location.

1-Day Reminder:

Subject: Tomorrow's the big day! Final confirmation

Hi [Name],

Your photography session is tomorrow at [Time]!

Final details confirmed:

- Date: [Date]

- Time: [Time]

- Location: [Venue]

I'll arrive 15 minutes early. Can't wait to capture your special moments!

9. EVENT DAY & COMPLETION

Trigger: Manual trigger or calendar event completion **Actions:**

- Update ClickUp status to "Event Completed"
- Send thank you email
- Begin photo processing workflow

Thank You Email:

Subject: Thank you for an amazing [Event Type]!

Hi [Name],

What an incredible [Event Type]! Thank you for allowing us to capture your special day.

Your photos are now in processing. You can expect:

- Sneak peek (5-10 photos): 2-3 days

```
- Full gallery: 2-3 weeks

I'll keep you updated on the progress through our Slack channel.
```

10. FINAL DELIVERY & PAYMENT

Trigger: Google Drive folder "Final" is created and populated **Actions:**

- Send final gallery notification
- Generate final payment invoice (remaining 50%)
- Update ClickUp status to "Final Delivery"

Final Delivery Email:

```
Subject: Your complete photography gallery is ready!

Hi [Name],

Your complete photography gallery is now ready in your Google Drive folder!

Access your photos: [Drive Link to Final folder]

To complete your photography package, please process the final payment:
[Stripe Link]

Thank you for choosing us to capture your memories!
```

11. PROJECT COMPLETION

Trigger: Final payment received **Actions:**

- Update ClickUp status to "Project Complete"
- Send completion confirmation
- Request testimonial/review
- Add to future marketing lists (with permission)

ClickUp Status Workflow

1. **New Lead** → 2. **Scheduling Call** → 3. **Call Completed** → 4. **Proposal Sent** → 5. **Proposal Accepted** → 6. **Deposit Received** → 7. **Event Approaching** → 8. **Event Completed** → 9. **Final Delivery** → 10. **Project Complete**

Required Integrations for n8n

- **Typeform** (webhook trigger)
- **Gmail/Outlook** (email sending)
- **ClickUp** (CRM/project management)
- **Calendly** (scheduling)
- **Stripe** (payment processing)

- **Google Drive** (file storage)
- **Slack** (client communication)
- **Google Calendar** (event scheduling)

Key Variables to Store

- Client information (name, email, phone)
- Event details (type, date, venue)
- Proposal amount and payment status
- Folder IDs (Google Drive)
- Channel IDs (Slack)
- Task IDs (ClickUp)
- Payment links and transaction IDs

Error Handling & Fallbacks

- If email fails: Log error and try alternative email service
- If ClickUp update fails: Store data locally and retry
- If payment fails: Send notification to admin
- If folder creation fails: Manual creation trigger

Monitoring & Analytics

- Track conversion rates at each stage
- Monitor email open/click rates
- Log all webhook failures
- Generate monthly performance reports