Course: The Automated Empire: Scale to 6-Figures on Autopilot

Lesson 7: Automated Project & Task Management

1. Core Concept & Learning Objective

Core Concept (148 words): Your client onboarding (Lesson 6) is now automated, but what happens *next*? The "project" starts, and a "task tsunami" hits. You manually create 20 to-do items, set 10 reminders, and copy/paste the same info into your Operations Hub. This is a "handoff" bottleneck. This lesson automates your *internal* project kick-off. You'll learn to use your Operations Hub (Notion/Airtable) as a *trigger*. The "Trigger" (a new project) will automatically create your entire project to-do list from a template, assign tasks, and set due dates, all before you've even opened your laptop. This isn't just about saving time; it's about building a scalable, repeatable system for delivering perfect work, every time.

Learning Objective: By the end of this lesson, you will be able to **design** a "templated" project task list and **build** an automation that automatically creates and assigns a full list of to-do items in your Operations Hub the *moment* a new project is created.

2. Interactive Content Activities

Activity 1: Case Study: "The 'Forgot-a-Step' Failure"

- **Type:** Case Study Analysis
- **Time:** 15 minutes
- **Instructions:**
    1. Read the scenario: "Founder 'Carlos' onboards a new client perfectly. He starts the project from memory. Two weeks in, the client emails, 'Where is the kick-off-call summary you promised?' Carlos *forgot* to send it because it wasn't on his to-do list. He apologizes, but the client's confidence is shaken. The 'white-glove' feeling is gone."

2. In the text box, answer: "What was the single point of failure in Carlos's process? How would an automated 'task template' have prevented this 100% of the time?"

- **Expected Outcome:** A clear understanding that relying on *memory* for project tasks is unprofessional and unsustainable. A "templated" system is the only solution.

Activity 2: Tool Exploration: "The 'Database Template' Feature"

- **Type:** Tool Exploration
- **Time:** 20 minutes
- **Instructions:**
  1. Log in to your Operations Hub (Notion or Airtable).
  2. **In Notion:** Go to your "Projects" database. Click the "New" button's down-arrow and create a "New Template." Inside this template, create a pre-built to-do list for a "New Project."
  3. **In Airtable:** Go to the "Automations" tab. Explore the "When record is created" trigger.
  4. The goal is to find the *native* "template" feature in your chosen tool. This is what your automation will "copy" from.
- **Expected Outcome:** The creation of a "master" task list template *inside* your Operations Hub, which will serve as the "blueprint" for your automation.

Activity 3: "My 'Standard Operating Procedure' (SOP) for a Project" (Peer Collaboration)

- **Type:** Peer Collaboration / Discussion
- **Time:** 15 minutes
- **Instructions:**
  1. Think about the 5-10 "standard" steps you *always* take for a new client project. (e.g., "1. Send Kick-off Call Scheduler," "2. Draft Project Brief," "3. Send Brief for Approval," etc.)
  2. Go to the community discussion board.

3. **Post:** "My 5-Step 'SOP' for a new project is:"
4. *Example:* "1. Create private Slack channel. 2. Send welcome gift. 3. Schedule kick-off. 4. Send project brief. 5. Get approval on brief."
5. Reply to one other student's list and suggest a step they might be missing (e.g., "Don't forget to schedule a 'Mid-Project Check-in'!").

- **Expected Outcome:** A refined, "standard" list of project tasks that is ready to be built into the assignment's automation.

3. Assignment & Project Milestone

Assignment: The "Project Kick-Off" Automation (Component 7 of Final Project)

- **Estimated Time:** 90 minutes
- **Deliverable:** A short (1-2 min) screen-recording video (using Loom) where you:
  1. Show your "Client Onboarding" automation (from Lesson 6) *creating a new project* in your Notion/Airtable Hub.
  2. Show your *new* "Project Kick-Off" automation (from *this* lesson) see that new project, and *automatically populate* it with your full "templated" to-do list.
- **Description:** This automation "daisy-chains" onto your last one. Your "Payment-to-Welcome" machine (Lesson 6) creates the project. This *new* automation sees that project and *builds out* the entire task list.
- **Step-by-Step Instructions:**
  1. **Your Stack:** Zapier/Make and your Notion/Airtable Hub.
  2. **In your Hub:** Finalize your "New Project Task List" template (from Activity 2).
  3. **In Zapier/Make:** Create a new automation.
  4. **Trigger:** "New Database Item" in your "Projects" database (Notion) or "New Record" in your "Projects" table (Airtable).
  5. **Action 1 (Loop):** You'll need to "find" or "create" multiple tasks.
     - **In Zapier:** Use the "Looping" feature or "Create Multiple Database Items."

- **In Make:** Use the "Iterator" module.

6. **Action 2 (Create Tasks):** For each task in your template (e.g., "Send Kick-Off Scheduler," "Draft Brief"), create a *new* item in your "Tasks" database.
7. **Map the Data:** Crucially, *map the "Project ID"* from the Trigger to the "Link to Project" relation field for *each* new task. This links all your new tasks to the new project.
8. Test the automation by running your Lesson 6 automation (or just manually creating a new project).
9. Record your Loom video showing the *entire sequence* working. This is Component 7.

- **Connection to Final Project:** This is the "Project Delivery" module of your playbook. You have now automated the *start* of your project work, ensuring no steps are ever missed.
- **Evaluation Criteria:**
  - **Excellent:** The video clearly shows the "daisy-chain" effect: a new project appears, and then the new tasks *automatically* appear and are correctly linked to that project.
  - **Proficient:** The video shows the automation running, but the tasks may not be correctly linked to the project.
  - **Needs Improvement:** The automation only creates *one* task, not a "list" of tasks, or the video doesn't show the automation working.

4. End-of-Lesson Assessment

(Multiple Choice 1) What is the *primary* risk of managing project tasks "from memory"?

- A. It takes too long to remember what to do.
- B. You will inevitably forget a critical step, which breaks client trust.
- C. You cannot bill for "thinking time."
- D. It's not as creative as making it up as you go. *(Answer: B)*

(Multiple Choice 2) What is a "daisy-chain" automation?

- A. An automation that connects more than 10 apps.
- B. An automation that fails and causes a chain reaction.
- C. When the "Action" of one automation (e.g., "Create Project") becomes the "Trigger" for a *second* automation (e.g., "Populate Tasks").
- D. An automation that runs on a loop. *(Answer: C)*

(Multiple Choice 3) What is the "Trigger" for the "Project Kick-Off" automation (Assignment 7)?

- A. A new successful payment in Stripe.
- B. A new email in Gmail.
- C. A new "Project" record being created in your Operations Hub.
- D. A new task being marked as "Done." *(Answer: C)*

(Multiple Choice 4) In your assignment, what is the *most important* piece of data to "map" when creating your new tasks?

- A. The "Task Name."
- B. The "Due Date."
- C. The "Project ID," to link the task to its parent project.
- D. The "Status" (e.g., "To-Do"). *(Answer: C)*

(Short Answer 1) In your own words, what is a "bottleneck" in a process?

- *(Example Answer: It's a manual step where the whole process has to stop and wait for me to do something before it can continue.)*

(Short Answer 2) What are two of the "standard" tasks you added to your "New Project" template?

- *(Example Answer: 1. "Send Kick-off Call scheduler link" and 2. "Draft Project Brief for internal review.")*

(Scenario-Based 1) You want to add a step to your "Project Kick-Off" automation: "Send a Slack message to your #clients channel."

1. What "Action" (App and Event) would you add?
2. *Where* in the sequence would you add it?

- *(Answer: 1. Action App: Slack, Action Event: "Send Channel Message." 2. I would add this right after the "Trigger," so I get an instant notification that the new*