

Project 047 - AI Client Operations & Service Delivery System

Client Brief | Make.com Flagship Project | Northstar Creative Studio

Business Need	Replace fragmented intake, task planning, onboarding, follow-up, escalation, and closeout work with one connected operating system.
Primary Outcome	Faster request handling, clearer ownership, consistent client follow-up, structured project setup, and auditable delivery status.
Core Stack	Make.com, Airtable, Google Forms, Google Sheets, Groq AI, Gmail, Slack, Google Drive.

Client Challenge

Northstar Creative Studio receives service requests that can vary widely in scope, urgency, complexity, budget, and required team. Manual handling creates avoidable delays: requests must be interpreted, routed, converted into tasks, organized into project folders, followed up when clients go quiet, and escalated when automated outreach is no longer appropriate. The client needs a lightweight system that improves operational consistency without removing human oversight.

Proposed Solution

Build a six-workflow service-delivery system in Make.com with Airtable as the operational database. AI is used for structured triage and task planning, while deterministic rules control routing, reminders, escalation, status changes, and logging. Slack and Gmail provide team/client communication; Google Drive provides standardized project structure.

Workflow Scope

- **WF01 - Service Request Intake & AI Triage:** captures form submissions, logs raw intake, classifies service type/priority/complexity, checks for an existing client, and creates the service request.
- **WF02 - Task Generation & Team Assignment:** converts the request into a structured AI task plan, parses JSON, creates Airtable task records, notifies operations, and advances the request to onboarding.
- **WF03 - Client Onboarding & Project Setup:** creates a dynamic project folder plus Brief, Working Files, Review, and Final Delivery subfolders, then notifies the team and logs onboarding.
- **WF04 - Reminder & No-Response Follow-Up:** finds requests waiting on clients, sends reminder emails, records Last Reminder Sent At, increments Reminder Count, and logs each follow-up.
- **WF05 - Re-engagement & Escalation:** detects repeated non-response, stops repetitive automation, alerts operations in Slack, and marks the request Escalated for manual intervention.
- **WF06 - Delivery Completion & Operations Closeout:** detects completed work, records completion, notifies operations, and writes the final activity log.

Key Controls & Reliability

- Structured AI outputs with restricted values for service type, priority, complexity, and team assignment.
- Duplicate-client safeguard before client creation.
- Iterator-based task record creation from the AI task array.
- Dynamic Google Drive parent-folder mapping so each project gets its own standardized workspace.
- Reminder timestamps and counters to prevent blind repeated outreach.
- Human escalation after repeated non-response.
- Activity Log records operational actions across workflows.

Expected Business Value

- **Faster intake:** less manual interpretation and routing.
- **Clearer execution:** AI-generated tasks become structured, assigned work.
- **Consistent onboarding:** every project receives the same delivery folder structure.
- **Better follow-up:** reminders are time-based and measurable.
- **Safer automation:** repeated non-response is escalated to humans instead of endlessly automated.
- **Operational visibility:** Airtable, Slack, and the Activity Log provide a shared view of request state and actions.

Delivery Positioning

This project demonstrates a complete AI-assisted client operations lifecycle rather than a single isolated automation. The system connects intake, AI decision support, task execution, onboarding, communication, escalation, and delivery closeout into one repeatable operating model that can be adapted for creative agencies, marketing teams, professional services, consultancies, and other request-driven businesses.