

AI Client Operations & Service Delivery System

Make.com flagship portfolio case study

BUSINESS SCENARIO Northstar Creative Studio	AUTOMATION PLATFORM Make.com	CORE STACK Airtable • Google Workspace • Slack • Groq AI
SYSTEM SCOPE Intake → Delivery Closeout	WORKFLOWS 6 production-style scenarios	DESIGN PATTERN AI-assisted, state-driven operations

Executive Summary

Project 047 is an end-to-end client operations system designed for a creative-services business that receives multi-channel project requests, needs consistent qualification and routing, and must coordinate execution across internal teams. The solution turns a raw service request into a structured operational lifecycle: capture, AI triage, client deduplication, task generation, onboarding, follow-up, escalation, and final closeout.

Business Problem

- Client requests often arrive with inconsistent detail, making manual qualification slow and error-prone.
- Repeated clients can create duplicate CRM records, fragmenting history and causing unreliable reporting.
- Project handoff from intake to delivery requires coordinated task creation, team assignment, file setup, reminders, and status tracking.
- No-response situations can stall work unless follow-ups are timed, counted, and escalated to a human at the right point.
- Operations teams need one source of truth that preserves request history and makes every significant action visible.

Solution Overview

The system uses Airtable as the operational database, Google Forms/Sheets as the intake layer, Make.com as the orchestration engine, Groq as the AI reasoning layer, Google Drive for project workspace creation, Gmail for client reminders, and Slack for internal visibility. Each workflow is modular and state-driven, allowing the system to react to changes in request status without forcing all logic into one oversized scenario.

Data Model

Clients	Client ID, name, company, email, phone, status, created time, linked service requests
Service Requests	Request ID, description, budget, deadline, AI triage fields, assigned team, request status, timestamps, reminder tracking, linked tasks/logs
Tasks	Task ID, linked request, task name/type, assigned team, status, due date, created time
Activity Log	Scenario, action, status, message, timestamp, error metadata, linked service request

Relational design: Service Requests link to Clients, Tasks, and Activity Log records so lifecycle events remain traceable.

Six-Workflow Operational Lifecycle

WF01 - Service Request Intake & AI Triage

[Google Forms](#) → [Google Sheets](#) → [Groq AI](#) → [JSON Parse](#) → [Airtable lookup/branching](#) → [Create Client or reuse existing Client](#) → [Create Service Request](#)

Captures request data, creates a raw intake log, performs AI triage, and protects the Clients table from duplicates using email-based lookup logic. AI output includes service type, priority, complexity, summary, requirements completeness, missing requirements, and assigned team.

WF02 - Task Generation & Team Assignment

[Airtable Watch](#) → [Groq AI Task Planner](#) → [JSON Parse](#) → [Slack](#) → [Activity Log](#) → [Status Update](#) → [Iterator](#) → [Task Records](#)

Transforms a qualified service request into a structured task plan. The AI returns a JSON task array; an Iterator splits the array so each task becomes an individual Airtable record. The workflow also notifies operations and advances the request to Ready for Onboarding.

WF03 - Client Onboarding & Project Setup

[Airtable Watch](#) → [Create Project Folder](#) → [Create 01 Brief / 02 Working Files / 03 Review / 04 Final Delivery](#) → [Slack](#) → [Activity Log](#)

Builds a repeatable project workspace in Google Drive. All subfolders use the dynamically returned parent folder ID, ensuring each new project receives its own folder structure instead of writing to a hard-coded path.

WF04 - Reminder & No-Response Follow-Up

[Airtable Search](#) → [Get Client Details](#) → [Gmail Reminder](#) → [Update Follow-Up Status](#) → [Activity Log](#)

Finds requests waiting on a client, retrieves the linked client email, sends a follow-up, records Last Reminder Sent At, updates Updated At, and increments Reminder Count using Make math functions. This prevents blind or untracked repeat follow-ups.

WF05 - Re-engagement & Escalation

[Airtable Search](#) → [Slack Escalation](#) → [Mark Request Escalated](#) → [Activity Log](#)

Detects requests that have crossed a reminder threshold and remained inactive. Automated client messaging stops and the request is escalated to the operations team for human review or direct outreach.

WF06 - Delivery Completion & Operations Closeout

[Airtable Search](#) → [Slack Completion Notice](#) → [Finalize Request](#) → [Activity Log](#)

Closes the lifecycle when a request reaches Completed. The workflow records the completion timestamp, confirms the final status, notifies operations, and writes a closeout audit record.

AI Design & Guardrails

- Structured JSON outputs are used so AI results can be parsed deterministically rather than handled as free-form text.
- Allowed classification values are constrained for Service Type, Priority, Complexity, and Assigned Team to match Airtable single-select options.
- Requirements Complete and Missing Requirements follow a consistency rule: complete requests return an empty missing-requirements array; incomplete requests must identify at least one necessary missing item.
- The task planner produces an array that is processed through an Iterator, allowing a variable number of tasks without hard-coding six separate creation modules.

Operational Safeguards

- Duplicate client safeguard: existing client records are reused instead of recreating the same client on every submission.
- State-based workflow triggering: scenarios search or watch specific request statuses such as Ready for Onboarding, Waiting for Client, Escalated, and Completed.
- Reminder tracking: Last Reminder Sent At plus Reminder Count make follow-up history explicit and support future anti-spam thresholds.
- Activity Log: each major workflow writes a success/warning record with scenario, action, message, timestamp, and error metadata fields.

What the System Demonstrates

End-to-End Outcome

A single client request can now move through the full delivery lifecycle with traceable automation at every major state transition. Intake data is preserved, AI adds operational intelligence, duplicate clients are prevented, tasks are generated dynamically, the project workspace is created automatically, stalled requests receive controlled follow-up, non-responsive cases are escalated to humans, and completed work is closed out with an audit trail.

Representative Test Case

Client	Olivia Bennett - Lumina Skincare Co.
Request	Product Launch Social Media Campaign
Budget	\$2,501-\$5,000
AI Classification	Marketing Support High Priority High Complexity
Assigned Team	Marketing Team
Generated Tasks	Multiple structured execution and review tasks created in Airtable
Lifecycle Proof	Slack notifications, Drive project structure, reminder tracking, escalation logic, and completion logging validated

Skills Demonstrated

• Make.com multi-scenario orchestration and scheduling • Airtable relational data modeling, linked records, search formulas, record creation/update • Groq LLM integration, prompt engineering, constrained classification, JSON outputs • JSON parsing, arrays, Iterator-based task fan-out • Google Forms and Sheets intake logging	• Google Drive dynamic folder creation using parent Folder IDs • Gmail automated client communication • Slack operational notifications and escalation • State-machine thinking using request statuses and timestamps • Reliability design: deduplication, reminder counters, escalation thresholds, audit logging
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Business Value

- Reduces manual coordination between intake, operations, creative teams, and project administration.
- Creates consistent client records and preserves lifecycle history for future reporting and service analysis.
- Improves response discipline by making reminders measurable rather than ad hoc.
- Introduces a clear human handoff point after repeated non-response instead of endlessly automating client contact.
- Standardizes project setup so every approved job starts with the same Drive structure and operational visibility.

Future Reliability & Scale Roadmap

- Add service-request duplicate protection using an idempotency key or source response ID.
- Replace test minute thresholds with configurable SLA windows by service type, priority, or client tier.
- Add retry/error-handler routes with dedicated Failure/Retry Activity Log entries and Slack alerts.
- Introduce owner-level routing, workload balancing, due-date calculation, and task dependencies.
- Add client response detection so Waiting for Client automatically returns to In Progress when a reply is received.
- Add dashboards for turnaround time, reminder rate, escalation rate, task completion, and client activity.