



cur.ate

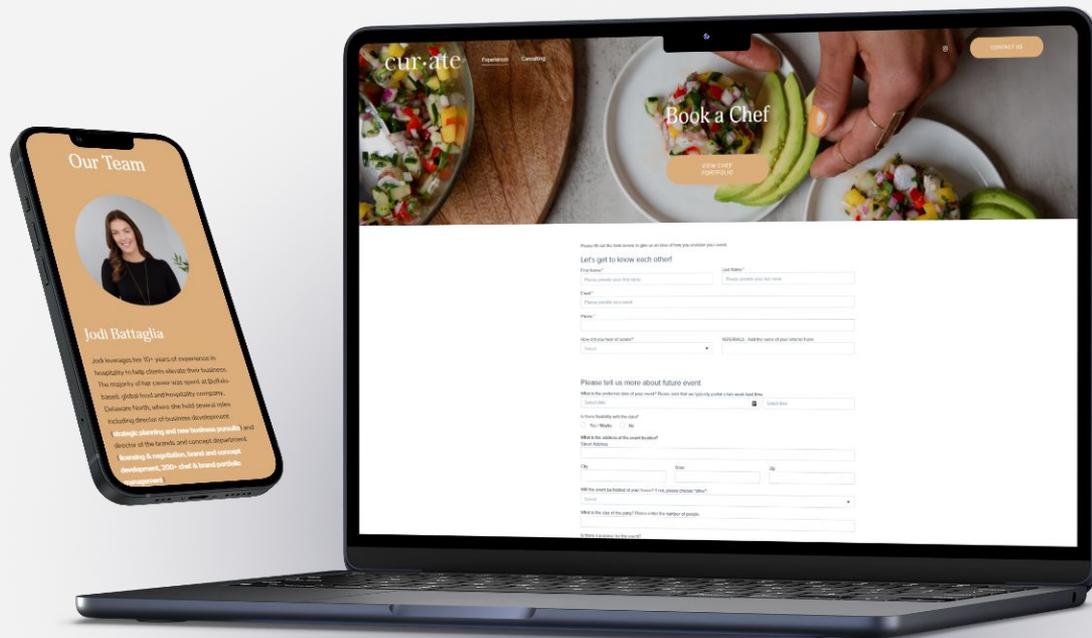
Saving client \$75,000 in dev costs and 15 hours of weekly manual labor through the team and client onboarding automation

Summary

The client approached Forcoda looking to build a mobile app, but after a strategy session, it was determined that automation of current processes would be more effective.

Forcoda suggested integrating a CRM system to streamline onboarding and training processes, and created automated workflows for tasks such as call schedulers, automated emails, invoices, forms, and payment reminders.

Although there were some limitations with the automation tool, Forcoda found workarounds to fulfill the initial requirements.

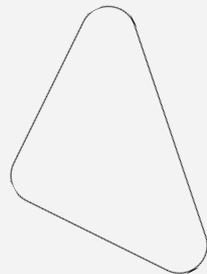


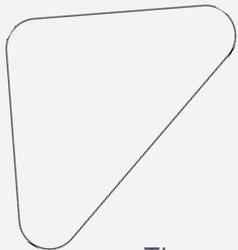
Background

Originally, the Client, being an owner of a 1-year-old private chef platform that connects chefs with guests seeking a unique culinary experience at home, approached us because one of their users told them that they need to build a mobile app. And that's how we connected, – **the Client came to us looking to build a mobile app** to make their business more streamlined.

So our CEO, Lena had a one-hour strategy session to hear about the Client's business, understand the pain points and what they have been trying to achieve. It appeared that all the Client wanted was to streamline the processes and make them more scalable. We also discovered that down the line the Client was looking to bring more Chefs, more team members to handle the events so to make it more hands-off and more scalable so that way the Client can run it properly.

So that's where Lena advised the Client to not invest lots of time and money into a mobile app, because what **they needed was the current processes' automation.**





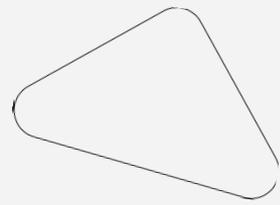
Challenge

The most painful **weaknesses** that Cur.ate needed to address were as follows:

- Reliant on people
- Availability constraints
- Training & ops experience
- Sole entrepreneurship
- Manual communication

That's when we suggested the CRM system integration so that way they can streamline the customers and members onboarding, training processes as they had to explain the same stuff over and over again. So that's where the suggestion to automate everything came in place.

The processes were done manually by the Client, and the Client had an experience and tried to use one of the automation tools, but it didn't prove itself useful at that time due to lack of automated processes set up.



Challenge

The client had already well-established **processes** that they developed to accommodate the following activities:

- Hiring a new chef
- Hiring a new event coordinator
- Making a lead convert into a Customer
- Getting a customer book an event: select a chef, cuisine, dishes, sign a contract and make a deposit
- Getting a customer through step-by-step onboarding process before an event

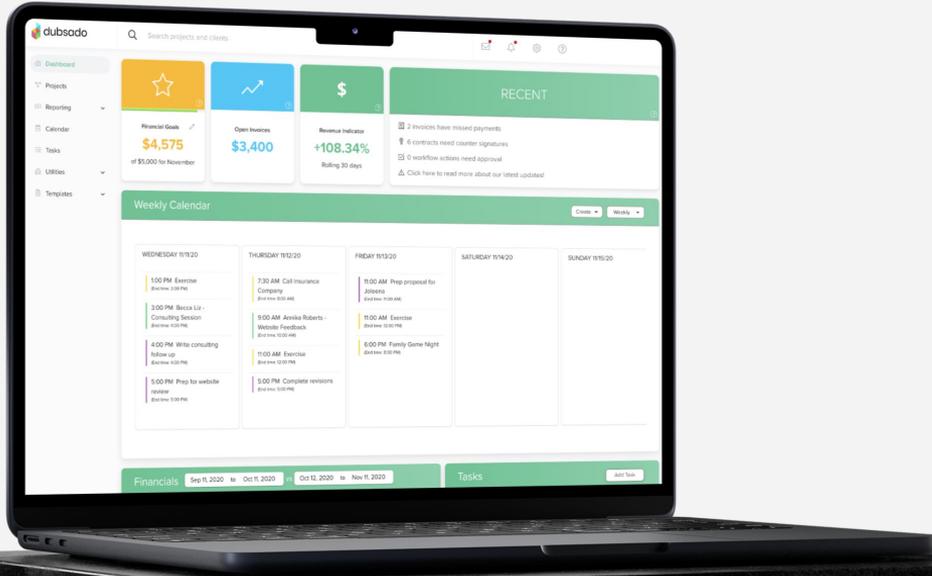
Forcoda identified an **opportunity with automation** that would help the client to achieve and **implement that they were looking for that is much more cost and time effective** and helped them to get ready for the busy summer season.

The automation created using its features and abilities at full capacity was able to take the repetitive work off the Client's plate with automated workflows, recurring payments, invoices, automated emails and forms, payment reminders and many more.

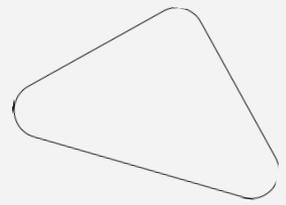
Project Approach

We started by identifying the most commonly used processes that can be automated with an automation tool and CRM integration.

While working closely with the client, Forcodia outlined everyday tasks and all active steps and bundled them into logical processes called workflows.



Project Approach



List of **different actions** that we set up within an automation tool:

- Roles Tags
- Event Stages
- Smart fields to make it personal for the Customers
- Internal (Client) notifications and ToDo tasks
- External (Customer) automatic emails and templates
- Forms
- Call Schedulers
- Integrations with 3rd party tools
- Food Packages

- Contracts for all parties (Customer, Chef, Coordinator, Vendor)
- Invoices and Payments Schedulers
- Triggers

And packing up those items into Workflows per Process.

Initially, we came up with 9 workflows that increased into 14 workflows during development.

There were some complications that prevented using the automation as planned due to automation tool features limitations, however Forcoda came up with several workarounds that were able to fulfill the initial requirements.

Project Approach

Example of the workflow that saved at least 3–5 hours of manual work for the client:

1. **AUTO-SCHEDULER** Send a call scheduler link to the client's email
2. **NOTIFICATION** You got a call scheduled with the client
3. **NOTIFICATION** Why the client didn't fill in the initial form?
4. **EMAIL Reminder** for the client about the upcoming call
5. **FORM** First round intake questions about the event
6. **PACKAGE Menu** samples packages with pricing – to be picked from ready list of packages
7. **EMAIL** Share pricing with the client
8. **REMINDER TASK** Ping the client if form has not been filled in within 3 days
9. **STATUS** Update the client's status to In Progress **AFTER** The form is filled.

Search projects and clients

Calendar Overview

Saturday, July 29, 2023

Project 4:00 AM - 7:00 AM LEAD: 20230729 - D. Lipke - Chef Diego Castillo | diego@breveakitchen.com | 761-713-7041

Project 4:00 AM - 7:00 AM LEAD: 20230729 - D Lipke Debbie Lipke | dbtlipke@aol.com | 7653802366

Project 6:15 AM - 8:30 AM LEAD: 20230729 - R. Payne Ruby Payne | ruby.annamocaf@gmail.com | 3474254211

Tuesday, August 1, 2023

Task Aug 1 Add decor visuals & coordinators to Katie's Event Overview Katie's Wedding Dinner

Task Aug 1 Check inventory for 7 ramekins for Brent Ellicottville Bachelorette - Chef

More upcoming events

Dashboard

Projects

Reporting

Calendar

Tasks

Utilities

Templates

Scheduler

Forms

Cannot Emails

Packages

Workflows

Payment Plans

Workflows

Office Hours: 9:00 AM - 5:00 PM

[Client Lead] Step 1 - First-round call + follow-up

[Client Lead] Step 1 - Interested to know more about curate

[Client Lead] Step 2 - Menu samples (packages)

[Client] Step 3 - Final Menu + Contract + Invoice

[Client] Step 4 - Contract not signed notification

[Client] Step 5 - Plan + Invoice

[Client] Step 6 - Survey after Event

[Chef Lead] Step 1 - First-round call + follow-up

[Chef Lead] Step 2 - second-round call + BG check + Test Event

[Chef Lead] Step 3 - Gathering required docs + Contract

[Coordinator Lead] Step 1 - first-round call + follow-up

[Coordinator Lead] Step 2 - BG check + Test Event

[Coordinator Lead] - Step 3 - Gathering required docs + Contract

[Client Lead] Step 1 - First-round call + follow-up

add tag **Client** immediately after all previous actions complete

change project status immediately after all previous actions complete

send appointment scheduler **Free Consultation** immediately after all previous actions complete

send form **Intake Questionnaire** 1 day(s) before an appointment start time

create todo **Check if the client scheduled a call** immediately after all previous actions complete

activate portal immediately after all previous actions complete

send email **Clients - Portal and Form Welcome/Onboarding** immediately after all previous actions complete

send email **Clients - Meeting Follow Up** immediately after an appointment has ended

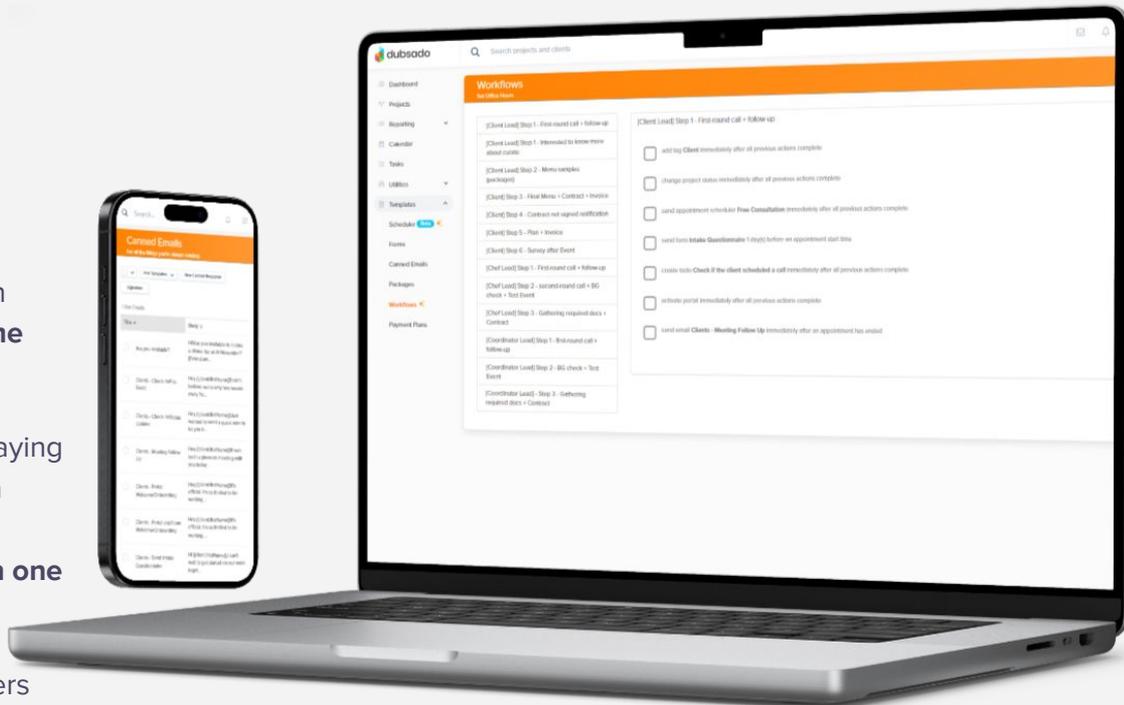
Approve

Outcome

Process automation via Dubsodo CRM and many reusable elements, such as ready templates, forms, contracts, and canned emails, allowed the Client to quickly process new customer and team application requests, **saving 15 hours of manual data entry time weekly.**

New automated workflows turn a new lead into a paying Customer independently 24/7. Now, customers can book a chef and an event on the website, sign a contract, and pay an invoice - **all automated and in one place.**

Now Cur.ate can invest valuable time where it matters the most — providing an outstanding customer experience and scaling the business.



Testimonial

Forcoda created smooth automated integration covering main areas to autopilot Client's business processes and automate the day-to-day "office work" without lifting a finger, saving the client **\$75,000 in mobile app development costs and 15 hours in manual labor per week.**



“My response time and client pipeline management has improved significantly. I can confirm the automation has quelled any feelings of overwhelm and not knowing where to start. My needs as a client were heard and applied to the development. Working with Forcoda, the communication was clear, the work product is quality and the partnership was felt.”

Jodi Battaglia | Owner, Curate Hospitality, Corp.