

Closed Won Deal to Reviewed Kickoff Plan

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A self-directed lab: two n8n workflows connecting HubSpot, Claude, Asana and Gmail that take a new SaaS client from a Closed Won deal to a reviewed kickoff plan — with a human approving every client message.

38

n8n nodes across two connected workflows

5 of 5

test clients routed to the right onboarding path

10

real build problems traced to a root cause and fixed

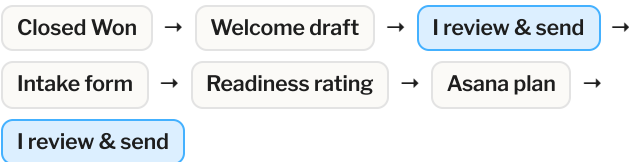
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client messages sent without a human pressing Send

The problem

The sales-to-implementation handoff is where details get lost. Onboarding starts after the sale, so many intake answers are still “not sure” — and a plan built on those gaps only looks finished. AI can draft a plan and an email in seconds, but one wrong message to a new client damages trust.

What I built



- **Built on a real rollout:** the discovery-first approach from my organization's move from Microsoft Access to Asana.
- **Sales handoff:** a Closed Won deal triggers a welcome email with an intake form; a hidden field starts planning the moment the client submits.
- **Readiness check:** Claude rates each intake green, yellow or red. Red clients get a discovery call within 5–10 days, not a plan built on guesses.
- **Plans through the API:** five PMBOK phases, tasks and subtasks created in Asana, with dates counted back from go-live, throttled with retries.
- **Draft only:** every client email waits as a Gmail draft; I review HubSpot, then Asana, then the email.

Results

- Five fictional test clients, five fitting outcomes: full plans, a plan with 6 labeled assumptions, or a discovery call first.
- Solved 10 real build problems, from API rate limits and token limits to a free-plan property cap.
- HubSpot's timeline shows the full journey: deal won, form viewed, form submitted, plan drafted.
- Ran on free plans for a few cents of Claude API usage per test run.

Review made the AI better

WHAT MY REVIEW CAUGHT	THE RULE I ADDED
A pilot scheduled on Christmas Day	Avoid weekends and major holidays
Nine questions in one welcome email	Cap client emails at 3 priority questions
A discovery call 7 weeks out	First meeting within 5–10 days
No specific kickoff date	Always propose a real meeting date

AI drafts, a human decides — and every repeated review edit becomes a rule, so the system keeps improving.

MY APPROACH TO AI IN CLIENT ONBOARDING