

Client Onboarding Automation

What this workflow does: When a new enquiry lands in your Google Sheet, n8n automatically sends the client a welcome email, creates a CRM entry, notifies you, and sets a follow-up reminder. No more missed leads.

What You'll Need

- A free or paid **n8n** instance (n8n.io cloud or self-hosted)
- A **Google account** with Gmail and Google Sheets
- ~20 minutes to set up

Step 1: Create Your Google Sheets

Create a new Google Spreadsheet with **two sheets** (tabs):

Sheet 1: "Enquiries"

Column	Header	Notes
A	Name	Client's full name
B	Email	Client's email address
C	Phone	Optional
D	Enquiry Type	e.g. Website, AI, Training
E	Source	Where they found you
F	Message	Their enquiry text
G	Status	Set to "New" for unprocessed rows
H	Processed Date	Auto-filled by the workflow

Sheet 2: "Clients" (your CRM)

Column	Header
A	Name
B	Email
C	Phone
D	Enquiry Type
E	Source
F	Date Added
G	Status
H	Notes

I	Next Action
J	Follow-up Date

Tip: You can connect this to your website's contact form via Google Forms (linked to the Enquiries sheet) or Zapier/Make to push form submissions into the sheet.

Step 2: Import the Workflow into n8n

1. Open your n8n instance
2. Go to **Workflows** → **Import from File**
3. Select `client-onboarding-workflow.json`
4. The workflow will appear with all nodes pre-configured

Step 3: Connect Your Credentials

1. Click on the **"Read New Enquiries"** node
2. Under Credential, click **Create New** → select **Google Sheets OAuth2**
3. Follow the Google sign-in flow to authorise n8n
4. Do the same for the **Gmail** nodes (Send Welcome Email, Notify You)

Important: Use the same Google account for both Sheets and Gmail credentials. If your business uses Google Workspace, use your business email.

Step 4: Customise the Placeholders

Search the workflow for these placeholders and replace them:

Placeholder	Replace with
<code>YOUR_SPREADSHEET_ID</code>	The ID from your Enquiries spreadsheet URL (between /d/ and /edit)
<code>YOUR_CRM_SPREADSHEET_ID</code>	Same spreadsheet ID (or a separate one if you prefer)
<code>YOUR_EMAIL@company.com</code>	Your email address (for notifications)
<code>YOUR_NAME</code>	Your name as it should appear in emails
<code>YOUR_COMPANY</code>	Your business name
<code>YOUR_PHONE</code>	Your business phone number

Step 5: Test the Workflow

1. Add a test row to your Enquiries sheet with Status = "New" and your own email
2. In n8n, click **Execute Workflow** (the play button)
3. Check that you receive: (a) the welcome email, (b) the notification email
4. Check that the CRM sheet has a new entry
5. Check that the Enquiries row now says "Processed"

Step 6: Activate & Go Live

1. Once testing passes, toggle the workflow to **Active** (top-right switch)
2. The workflow will check for new enquiries every 5 minutes
3. The follow-up reminder runs once daily

How the Workflow Flows

Node	What it does
Check for New Enquiries	Runs every 5 minutes
Read New Enquiries	Reads rows where Status = "New"
Has Email?	Filters out rows without an email address
Send Welcome Email	Sends a branded thank-you to the client
Create CRM Entry	Adds a row to your Clients sheet
Mark as Processed	Updates the Enquiries row to "Processed"
Notify You	Sends you a summary email with the enquiry details
Daily Follow-up Check	Runs once daily, checks for leads due a follow-up today
Send Follow-up Reminder	Emails you a reminder with the lead's details

Customisation Ideas

- **Slack/Teams notification:** Add a Slack or Microsoft Teams node after "Notify You" for instant alerts
- **Different welcome emails per enquiry type:** Add a Switch node after the filter to route by Enquiry Type
- **Automatic proposal:** Add a Google Docs node to generate a templated proposal PDF
- **Lead scoring:** Add a Code node to assign a score based on enquiry type and source

Troubleshooting

Problem	Solution
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Workflow doesn't trigger	Check it's set to Active (toggle in top-right). Check the Schedule trigger is set correctly.
Google auth error	Re-authenticate the credential. Ensure you've enabled the Sheets and Gmail APIs in Google Cloud Console.
Emails not sending	Check Gmail sending limits (500/day for free, 2000/day for Workspace). Check spam folder.
Wrong sheet data	Verify the sheet name matches exactly (case-sensitive). Check column headers match the workflow expectations.