

ASANA CRM Lead Engagement Workflow

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1. PROJECT OVERVIEW

A Zapier automation that monitors Asana for task status changes across the client pipeline and routes each change through one of five conditional paths — Ready to Start, No Response, Quoted, Approved, and Paid & Closed. Each path triggers a tailored sequence of actions across Gmail, Google Drive, Asana, and Slack, ensuring every deal stage receives the right communication and operations automatically.

Built to eliminate the manual work of tracking which clients need what communication at each pipeline stage. Before this automation, staff had to manually check Asana, draft emails, create folders, and assign tasks — all on a per-client basis, with no systematic way to ensure consistency. This workflow brings all of that under a single, trigger-based system.

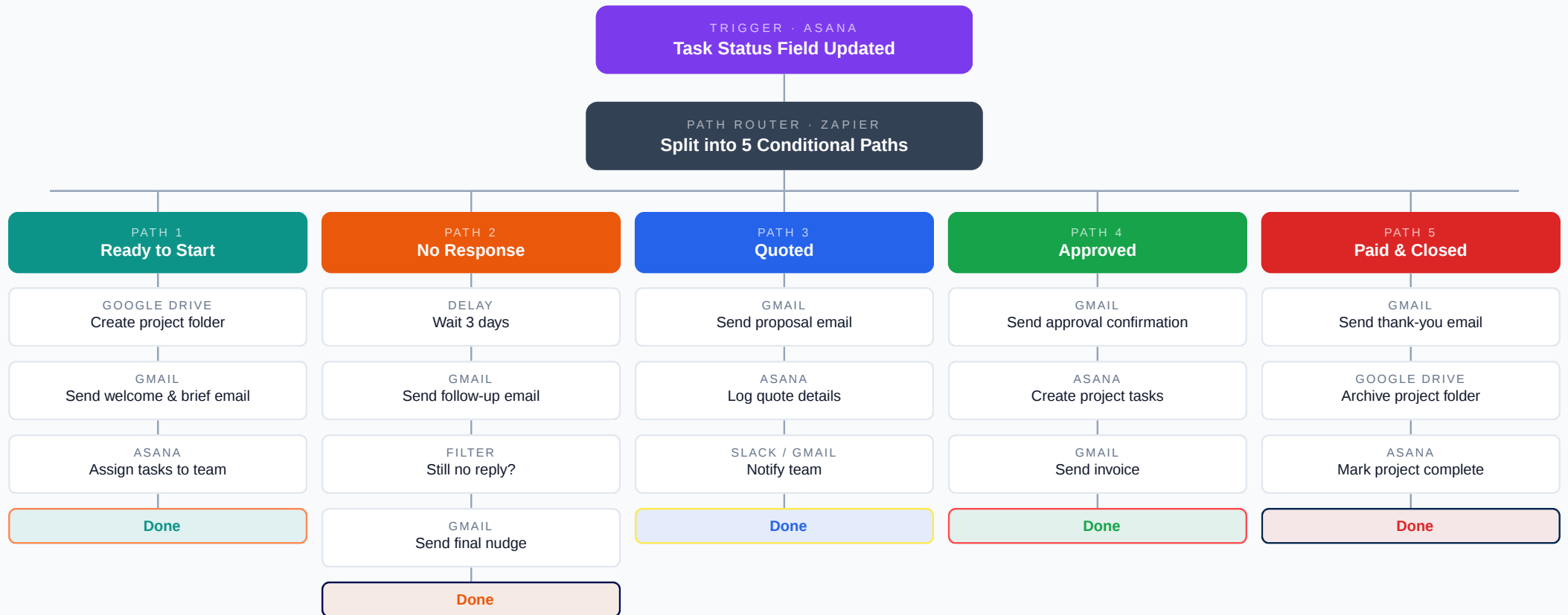
2. TECH STACK

LAYER	TECHNOLOGY	PURPOSE
Automation	Zapier	Workflow orchestration and path routing
Trigger	Asana	Monitors task status field for changes
Comms	Gmail	Sends templated emails per pipeline stage
Storage	Google Drive	Creates and archives project folders
Project Mgmt	Asana	Logs quotes, assigns tasks, marks complete
Notifications	Slack / Gmail	Alerts team when quotes or approvals land
Logic	Zapier Paths	Routes each status change to the correct action chain
Gate	Zapier Filter	Blocks no-response path if client eventually replies

3. BUSINESS IMPACT

- › Eliminates manual follow-ups — every status change triggers the right action automatically, with no staff intervention
- › Consistent client experience at every pipeline stage, regardless of workload or staff availability
- › No-response path with a built-in delay gate ensures leads are followed up before being silently dropped
- › Approved path creates the project folder and tasks in a single click — onboarding starts instantly
- › Scales to any volume: 10 clients or 1,000, the automation handles each identically
- › Adding a new pipeline stage requires only one new Zapier path — no code, no IT ticket

WORKFLOW ARCHITECTURE — 5-PATH PIPELINE ROUTER



4. PATH-BY-PATH BREAKDOWN

Path 1 — Ready to Start

When a task is moved to Ready to Start, Zapier creates a Google Drive project folder for that client, sends a welcome email with project brief and next steps, and assigns the relevant Asana tasks to the project team. The client is onboarded immediately — no waiting for a staff member to action it manually.

Path 2 — No Response

A 3-day delay fires first, giving the client time to respond. A follow-up email is then sent. A Zapier filter checks if the client has since replied — if they have, the path halts. If not, a final nudge email goes out. This prevents leads from being dropped silently and ensures every prospect receives two touchpoints before being closed out.

Path 3 — Quoted

When a quote is issued and the task status updated, a proposal email is sent to the client, the quote details are logged directly in Asana, and the team is notified via Gmail. This keeps all stakeholders aligned and creates a clear audit trail of when quotes were issued.

Path 4 — Approved

Approval triggers an immediate confirmation email to the client, followed by project task creation in Asana so the team can begin work without waiting for a manual handoff. An invoice email is also sent — capturing payment initiation in the same flow as the approval notification.

Path 5 — Paid & Closed

When payment is confirmed and the task marked Paid & Closed, a thank-you email goes to the client, the Google Drive folder is archived, and the Asana project is marked complete. The client relationship ends on a professional note and the project records are cleanly filed.

5. KEY DESIGN DECISIONS

Asana as the Single Source of Truth

Rather than using a separate CRM or spreadsheet as the trigger source, Asana task status is the authority. Staff already update Asana as part of their normal workflow — adding automation on top of this requires zero behaviour change. The automation listens to existing actions rather than creating new ones.

Filter Gate on the No-Response Path

Without a filter, every client in the No Response stage would receive both the follow-up and the final nudge regardless of whether they replied in between. The Zapier filter checks current status before firing the second email, preventing over-communication with clients who have already responded.

Approval-to-Kickoff in a Single Path

The Approved path bundles client communication, team task creation, and invoicing into one sequence. This avoids the common gap where a project is approved but kickoff is delayed because someone forgot to create the Asana tasks or send the invoice. Everything fires together the moment approval is recorded.

Modular Path Architecture

Each pipeline stage is an independent Zapier path. Adding a new stage (e.g., "On Hold" or "Negotiating") means adding one new path branch without touching the existing ones. This keeps maintenance risk low — a change to the Quoted path cannot accidentally break the Approved path.

6. APPLICABLE USE CASES

- › Client services agencies managing proposal ' approval ' delivery pipelines
 - › Freelancers or consultants tracking lead status from first contact to invoice
 - › Sales teams using Asana as a lightweight CRM substitute
 - › Any business where client communication needs to be consistent across pipeline stages
 - › Teams transitioning from manual follow-up to systematic, trigger-based outreach
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