

10

ESSENTIAL WORKFLOWS FOR FREELANCERS



Automate your tasks.
Focus on your clients.

Less admin. More client work.

As a freelancer you are the salesperson, the project manager and the accountant. This playbook gives you ten workflows that take the repetitive part of those jobs off your plate, while you keep every decision that matters.

How to read it

Each workflow fits on one page: what starts it, the steps in order, example tools, the moment you stay in control, the usual mistakes and a simple way to begin. Tools are examples. Use the ones you already pay for.

How to use it

Don't build all ten. Pick the three that cost you the most time (page 15 helps you choose), set up the first one, run it for two weeks, then move to the next.

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The client journey in **ten workflows**

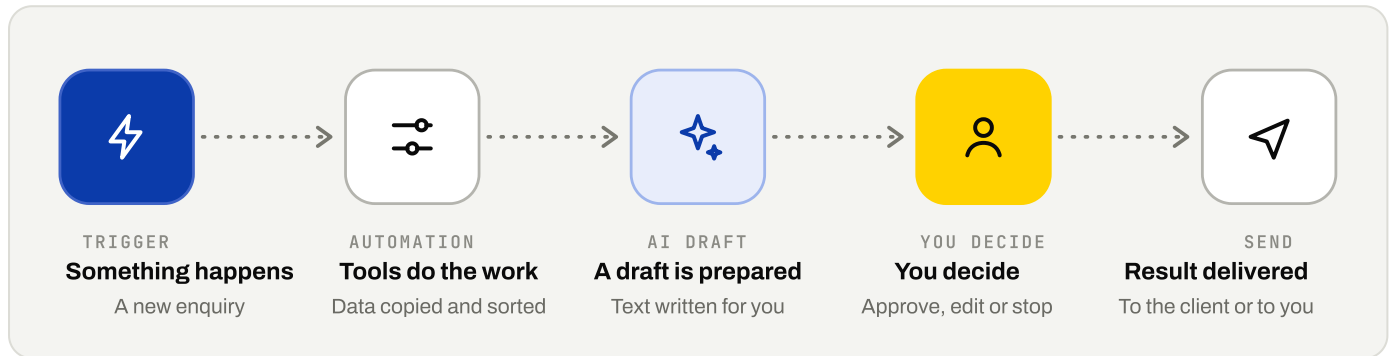
Every workflow follows a real moment in the life of a client project, from the first message to the final review. Each one hands its result to the next.



● Start: a new enquiry ● One workflow, one page → Each result feeds the next

Anatomy of a workflow

Every page in this playbook uses the same picture. Once you can read one, you can read them all.



- | | |
|---|---|
|  Trigger
The event that starts everything: a form, a status change, a date. |  Automation
Moves or reshapes data between your tools, the same way every time. |
|  AI draft
Writes or reads text: a draft reply, a summary, a receipt. Always checked. |  You decide
The point where you decide. Nothing important leaves without it. |
|  Save
Saves the result where you will find it: CRM, sheet, folder. |  Send
Delivers something to a client, a partner or you. |
|  Wait
Pauses until a date or a condition, such as a reminder. | |

THREE LEVELS OF HELP

- | | | |
|---|--|--|
| <div>1</div> A better prompt
You copy, paste and check. Best for writing and summarising. | <div>2</div> An automation
Rules move data between tools. Best for repetitive steps. | <div>3</div> An agent with approval
AI handles a pattern, you approve. Best for judgement calls. |
|---|--|--|

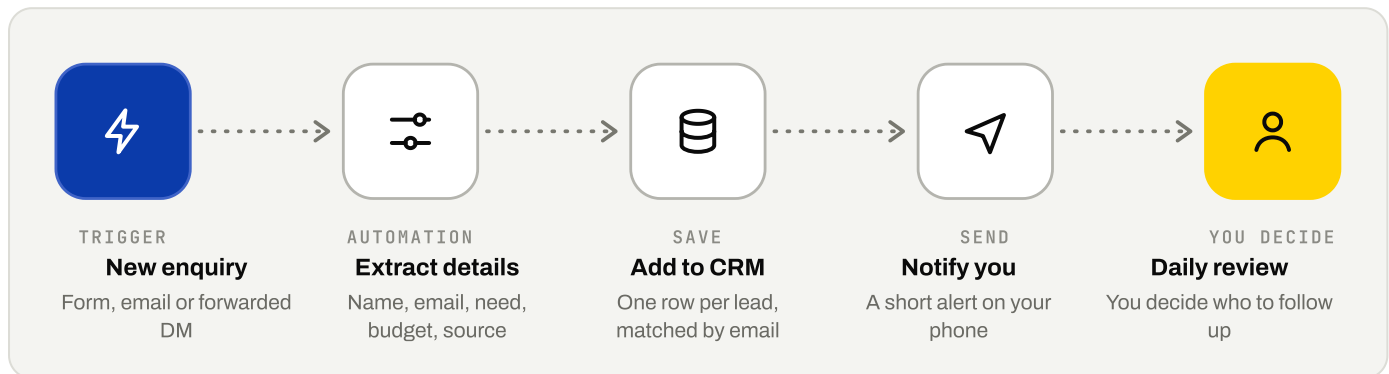

The golden rule
 Automate the copying, sorting and reminding. Keep a human check on anything a client will read, sign or pay.

01

■ WORKFLOW 01 · WIN CLIENTS

Lead capture to CRM

Every enquiry lands in one list, with its source, before it gets lost in an inbox.



TRIGGER

A new contact form submission, an email to your contact address, or a message you forward from social media.

TOOLS (EXAMPLES)

n8n

Google Sheets or Notion

Gmail

Telegram or Slack

WATCH OUT FOR

- ⚠ Duplicate leads: always match on the email address before adding a row.
- ⚠ A missing source field: without it you never learn which channel brings clients.
- ⚠ Personal data: link your privacy notice on every form and only keep what you need.



You stay in control

You read the new leads once a day and choose which ones get a reply. Nothing is sent to a prospect automatically.

START SIMPLE

Connect one form first. Add email and social channels once the list works for a week.

WHERE IT SITS IN THE JOURNEY

Feeds into 02 · Instant first reply

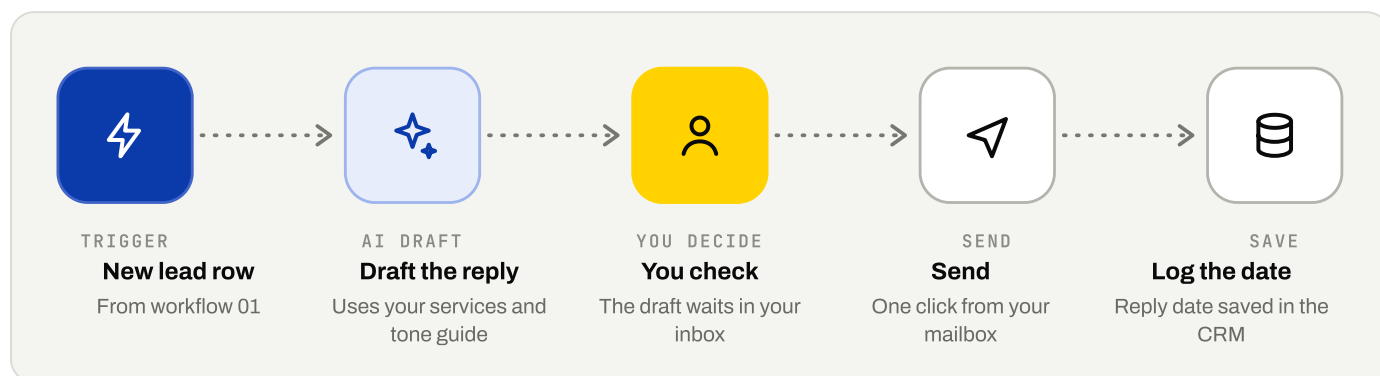


02

■ WORKFLOW 02 · WIN CLIENTS

Instant first reply

Answer every new lead quickly with a reply that sounds like you, checked by you.



TRIGGER

A new lead is added to your CRM by workflow 01.

TOOLS (EXAMPLES)

n8n

An AI model (for example Claude)

Gmail drafts

Google Sheets

WATCH OUT FOR

- ⚠️ Auto-sending AI replies: one wrong answer costs more than the time saved.
- ⚠️ Promising prices or dates in the draft: keep those out of the AI instructions.
- ⚠️ Generic tone: give the AI three of your real past replies as examples.



You stay in control

The AI writes a draft, never the final email. You read, edit if needed and press send yourself.

START SIMPLE

Write five short answers to the questions you get most often and feed them to the draft step.

WHERE IT SITS IN THE JOURNEY

Feeds into 03 · Discovery call booking

WIN CLIENTS

DELIVER

GET PAID

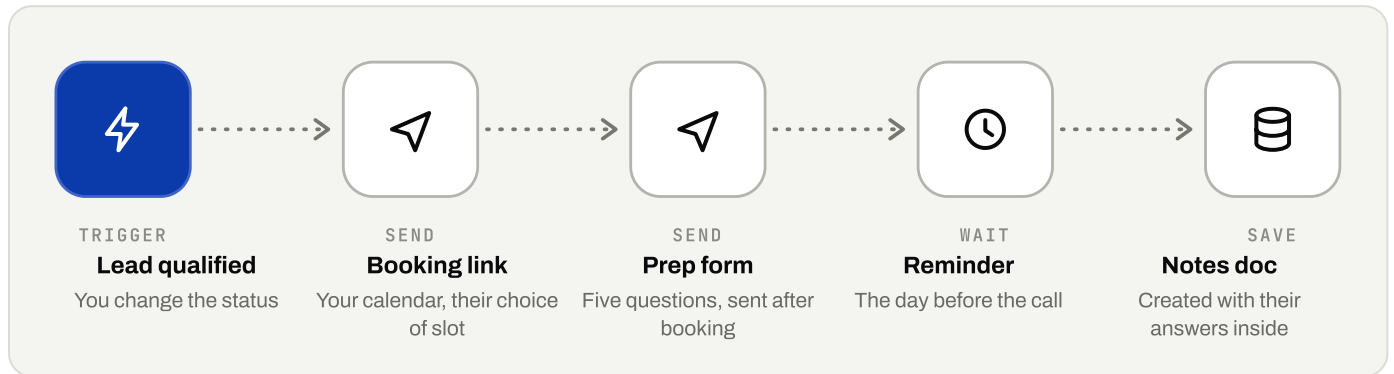


03

■ WORKFLOW 03 · WIN CLIENTS

Discovery call booking

Qualified leads book a call on their own, arrive prepared, and you get the notes ready.



TRIGGER

You mark a lead as qualified in your CRM.

TOOLS (EXAMPLES)

- n8n
- Cal.com, Calendly or Google Calendar
- Google Forms or Tally
- Google Docs

WATCH OUT FOR

- ⚠ Time zones: show slots in the client's time zone and confirm it in the email.
- ⚠ Long forms: more than five questions and people skip it.
- ⚠ Too many reminders: one reminder is helpful, three feel like spam.



You stay in control

Only leads you qualify receive your calendar. You keep full control over who gets your time.

START SIMPLE

Start with the booking link and the reminder. Add the prep form when the first part runs smoothly.

WHERE IT SITS IN THE JOURNEY

Feeds into 04 · Proposal from a brief

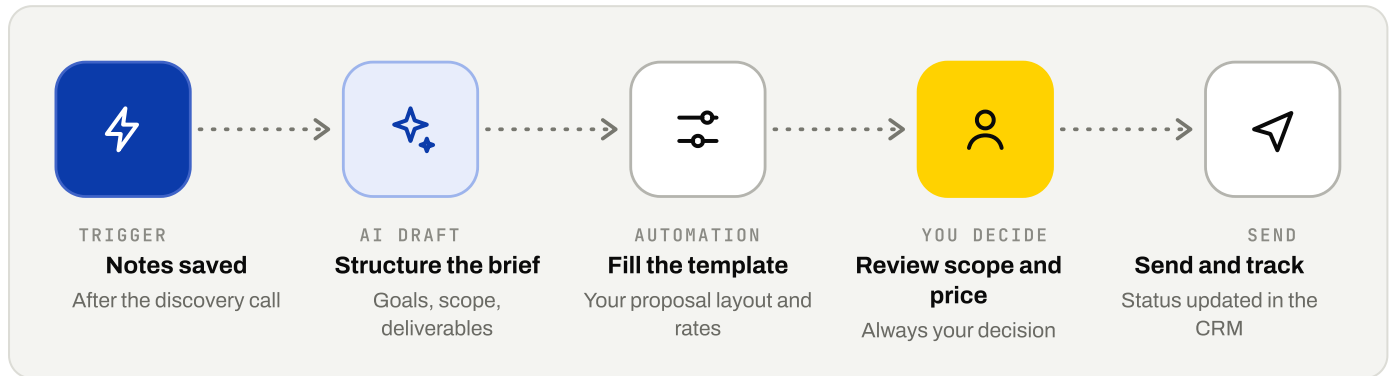


04

WORKFLOW 04 • WIN CLIENTS

Proposal from a brief

Turn your call notes into a first proposal draft in your own template.



TRIGGER

You save the notes of a discovery call in the client's notes document.

TOOLS (EXAMPLES)

n8n

An AI model

Google Docs template

Your rate sheet

WATCH OUT FOR

- ⚠ The AI inventing scope: ask it to flag anything not found in your notes.
- ⚠ Hand-edited templates: keep one master template and let the workflow copy it.
- ⚠ Version chaos: name files client, date and version number automatically.



You stay in control

Prices come from your rate sheet only, never from the AI. You review scope and price before anything is sent.

START SIMPLE

Use the workflow for the structure and the wording. Keep pricing as a manual step at first.

WHERE IT SITS IN THE JOURNEY

Feeds into 05 • Contract and signature follow-up

WIN CLIENTS

DELIVER

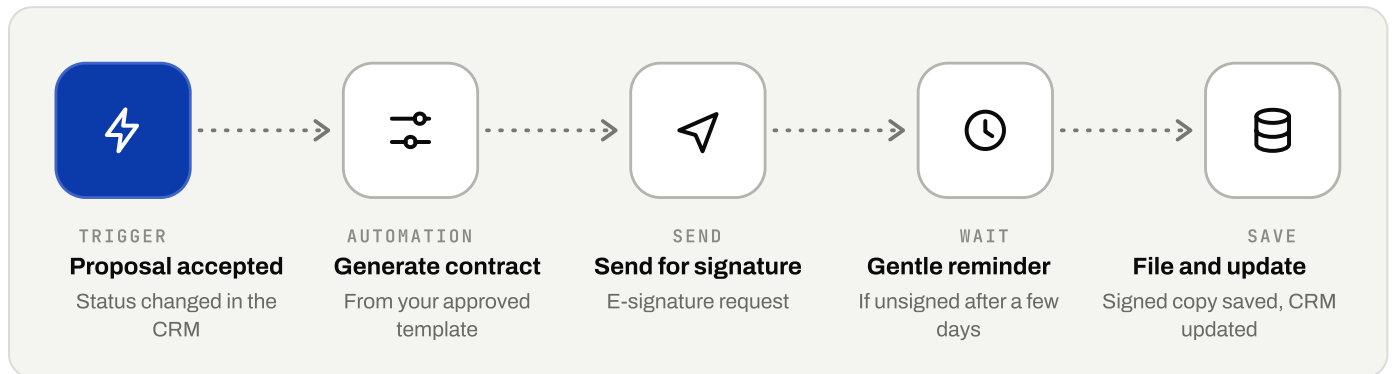
GET PAID



05

Contract and signature follow-up

Send the contract, track the signature and follow up without having to remember it.



TRIGGER

A proposal is marked as accepted in your CRM.

TOOLS (EXAMPLES)

n8n

Docs template

An e-signature tool

Google Drive



You stay in control

Your contract template is reviewed once by a legal professional. The workflow only fills names, dates and amounts.

WATCH OUT FOR

- ⚠ Changing clauses by hand for each client: create template variants instead.
- ⚠ Reminders after signature: always check the status before sending one.
- ⚠ Lost copies: store the signed PDF in the client folder straight away.

START SIMPLE

Automate the reminder first. It is the part people forget most often.

WHERE IT SITS IN THE JOURNEY

Feeds into 06 • Client onboarding pack

WIN CLIENTS

DELIVER

GET PAID

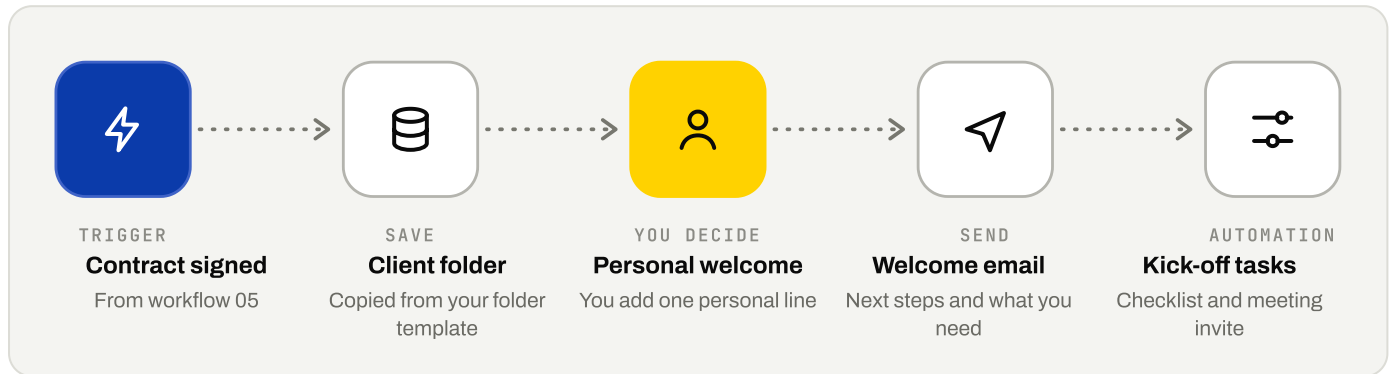


06

■ WORKFLOW 06 · DELIVER

Client onboarding pack

Start every project the same professional way, in minutes instead of an afternoon.



TRIGGER

The contract is signed (end of workflow 05).

TOOLS (EXAMPLES)

n8n

Google Drive

Gmail

Trello, Notion or Asana

WATCH OUT FOR

- ⚠️ Sharing permissions that are too broad: share the client folder only, never the parent.
- ⚠️ Forgetting to ask for access and assets: put them in the welcome email checklist.
- ⚠️ A different process for each client: improve the template, not the individual project.



You stay in control

The welcome email waits for your personal touch before it goes out. The structure is automatic, the relationship is yours.

START SIMPLE

Build the folder template and the checklist by hand once. Then let the workflow copy them.

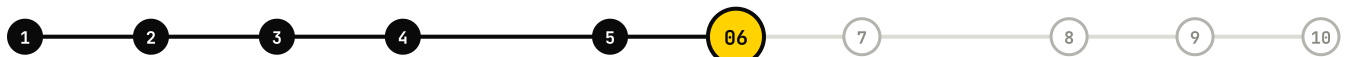
WHERE IT SITS IN THE JOURNEY

Feeds into 07 · Weekly status update

WIN CLIENTS

DELIVER

GET PAID

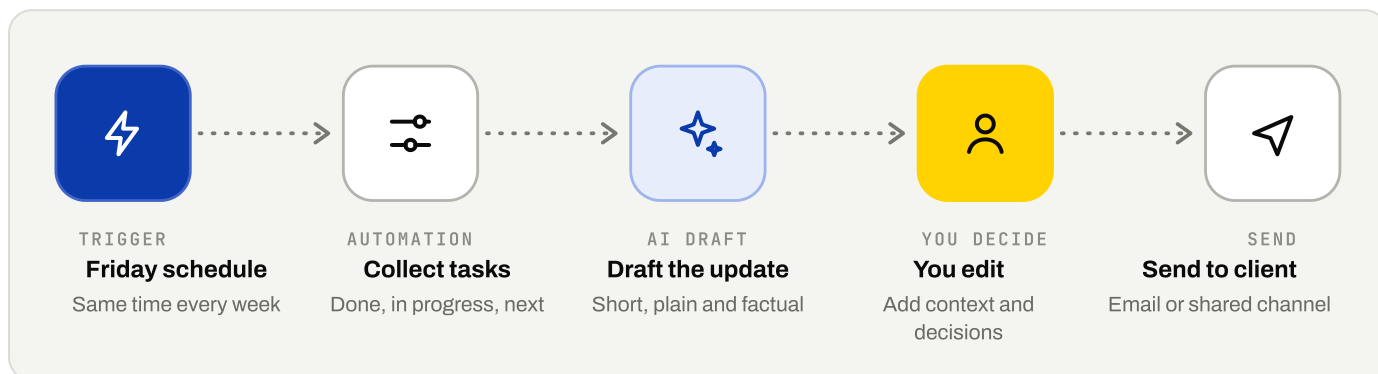


07

■ WORKFLOW 07 · DELIVER

Weekly status update

Clients get a clear progress note every week, drafted from the work you logged.



TRIGGER

A weekly schedule, for example every Friday afternoon.

TOOLS (EXAMPLES)

n8n

Your task board

An AI model

Gmail or Slack

WATCH OUT FOR

- ⚠ The AI overstating progress: tell it to use only the tasks marked done.
- ⚠ Blockers without context: always say what you need from the client and by when.
- ⚠ Long reports: five lines a client reads beat a page they skip.



You stay in control

You read every update before it goes out, so tone, blockers and decisions are always explained by you.

START SIMPLE

Start by sending the draft to yourself only. Share it with clients once you trust the format.

WHERE IT SITS IN THE JOURNEY

Feeds into 08 · Invoice and payment reminders

WIN CLIENTS

DELIVER

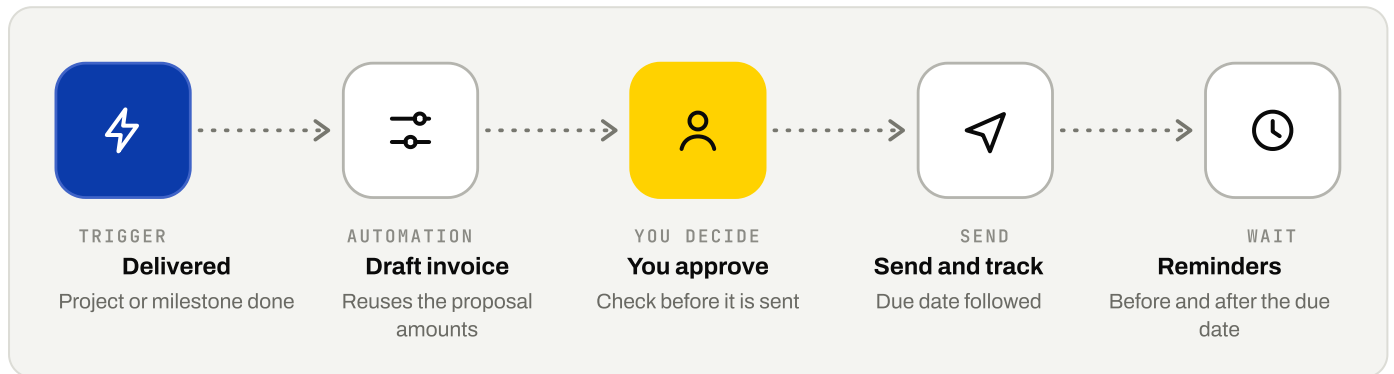
GET PAID



08

Invoice and payment reminders

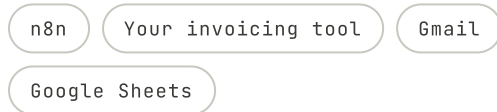
Invoices go out on time and polite reminders follow, so you stop chasing payments.



TRIGGER

A project or milestone is marked as delivered.

TOOLS (EXAMPLES)



WATCH OUT FOR

- ⚠ Legal invoice rules: check numbering, tax and mentions with your accountant.
- ⚠ Reminders after payment: mark invoices as paid before the reminder step runs.
- ⚠ Harsh tone: the first reminder should read like a friendly heads-up.

You stay in control
You approve every invoice. Reminders stop automatically as soon as the payment is recorded.

START SIMPLE Automate the reminders first. They are the step most freelancers postpone.

WHERE IT SITS IN THE JOURNEY

Feeds into 09 • Receipts to bookkeeping

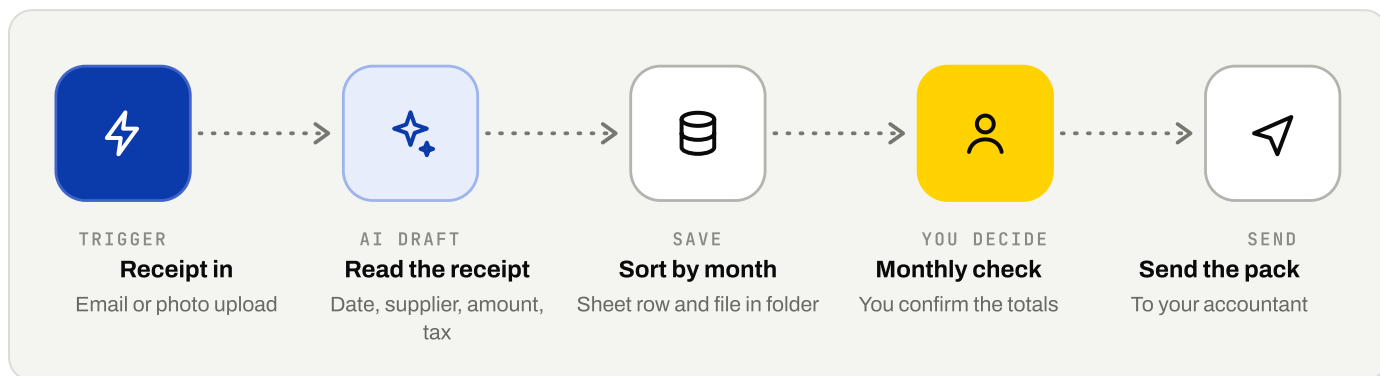


09

WORKFLOW 09 • GET PAID

Receipts to bookkeeping

Receipts are sorted every month and reach your accountant or gestoría without a shoebox.



TRIGGER

A receipt arrives by email, or you upload a photo to a folder.

TOOLS (EXAMPLES)

n8n

An AI model or OCR tool

Google Drive

Google Sheets

WATCH OUT FOR

- ⚠ Reading errors on amounts or tax: always compare totals with your bank statement.
- ⚠ Throwing away originals: keep the original file linked to each row.
- ⚠ Mixing personal and business expenses: use one dedicated email address for receipts.



You stay in control

You check the monthly totals before the pack is sent. Automatic reading can make mistakes on amounts.

START SIMPLE

Start with email receipts only. Add photo uploads once the sheet looks right for a month.

WHERE IT SITS IN THE JOURNEY

Feeds into 10 • Review request after delivery

WIN CLIENTS

DELIVER

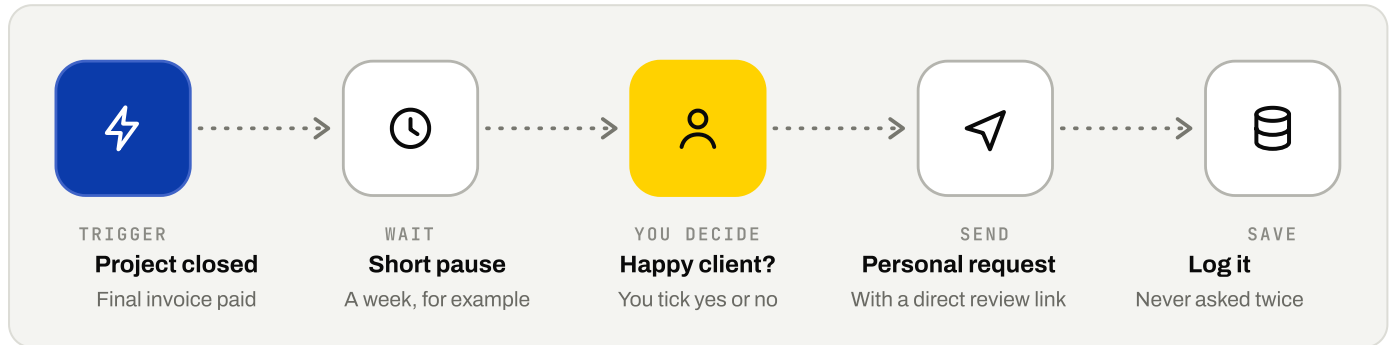
GET PAID



10

Review request after delivery

Ask satisfied clients for a testimonial at the right moment, and only once.



TRIGGER

The final invoice is paid and the project is closed.

TOOLS (EXAMPLES)

n8n

Google Sheets

Gmail

Google Business Profile or LinkedIn

WATCH OUT FOR

⚠ Asking unhappy clients: the yes or no check exists for a reason.

⚠ Publishing without permission: always get written consent first.

⚠ Asking twice: log every request and check the log before sending.



You stay in control

Only clients you mark as happy receive a request, and you ask before publishing any testimonial.

START SIMPLE

Write the request once in your own words. The workflow only chooses the moment.

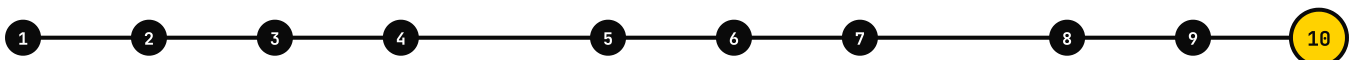
WHERE IT SITS IN THE JOURNEY

Closes the loop: happy clients bring new leads to 01

WIN CLIENTS

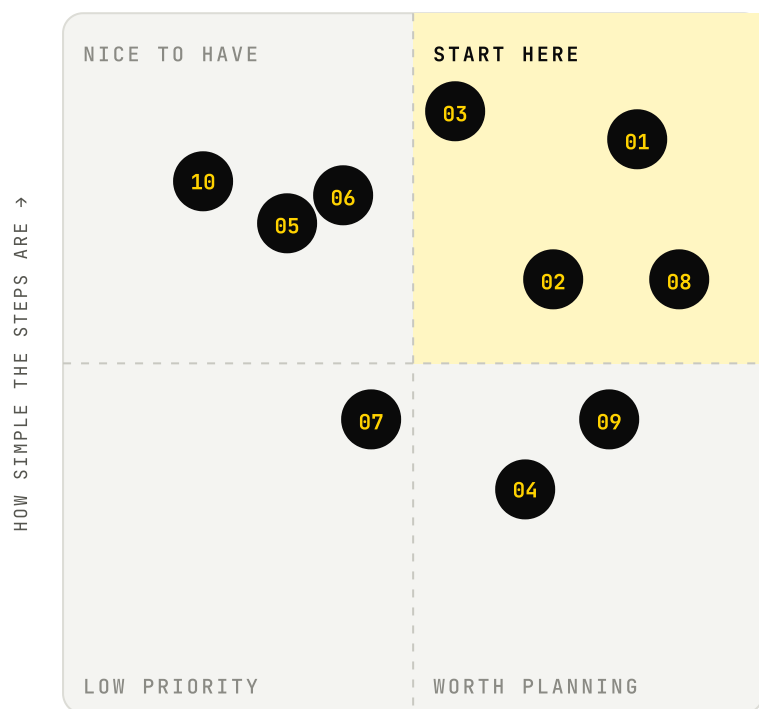
DELIVER

GET PAID



Where to start: your first three

The best first workflow is the one that eats your time and has clear, simple steps. Use this grid with your own tasks.



- 01 Lead capture to CRM
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- 10 Review request after delivery

Suggested placement for a typical freelancer. Your own grid will differ: move the dots to match your week.

YOUR SIX-STEP PLAN

- ☐ List the admin tasks you did last month and roughly how long each took.
- ☐ Pick three from the top-right corner. Those are your first workflows.
- ☐ Build one workflow, keep the human check, run it for two weeks.
- ☐ Place them on the grid: time spent across, simplicity up.
- ☐ Write down how long the first task takes by hand today. That is your baseline.
- ☐ Compare with your baseline, adjust, then start the next one.

■ WHAT'S NEXT

Automate your tasks. Focus on your clients.

■ LEARN IT

AI training

Hands-on sessions in Seville and Málaga, built around your own workflows.

■ BUILD IT WITH US

Automation services

We design, build and run your workflows and AI agents, with human approval at every key step.

■ EVERY MONDAY

The Monday playbook

One practical AI workflow in your inbox each week. Free, unsubscribe in one click.



Generative Z

www.generativez.es

Tool names are examples and belong to their owners. Check legal, tax and data-protection requirements for your country before automating contracts, invoices or personal data.