The workflows

Your 3 AI Workflows: Complete Implementation Guide (n8n Edition)

Getting Started with n8n

What is n8n?

n8n is an open-source workflow automation tool that connects your apps and services. It's more powerful and cost-effective than tools like Zapier or Make, especially for agencies.

Choose Your n8n Setup

Option 1: n8n Cloud (Easiest)

- Hosted by n8n team
- No server management needed
- Free tier: 5,000 executions/month
- Starter: $20/month for 5,000 executions
- Sign up at n8n.cloud

Option 2: Self-Hosted (Most Cost-Effective at Scale)

- One-time setup on your own server
- Unlimited executions
- Full control and privacy
- Requires basic technical knowledge
- $5-20/month for server hosting (DigitalOcean, AWS, etc.)

For this guide, I'll use n8n Cloud instructions, but everything works the same on self-hosted.

Workflow 1: Smart Client Intake System

What You'll Need

- **Typeform** (Free or Basic plan: $29/month)
- **n8n** (Cloud free tier or $20/month)
- **OpenAI API** (Pay-as-you-go, approximately $0.50-$2 per client)
- **Pipedrive** (your existing account)

- **ClickUp** (your existing account)
- **Gmail** (your existing account)

Step-by-Step Setup

Part 1: Build Your Typeform (30 minutes)

Create a new Typeform with these essential fields:

1. **Business Information**
   - Company Name (Short Text)
   - Industry (Dropdown)
   - Website URL (URL field)
   - Company Size (Multiple Choice: 1-5, 6-10, 11-25, 26-50, 51+)
2. **Contact Details**
   - Primary Contact Name (Short Text)
   - Email Address (Email field)
   - Phone Number (Phone field)
   - Best Time to Reach You (Multiple Choice: Morning, Afternoon, Evening)
3. **Project Scope**
   - What challenges are you trying to solve? (Long Text)
   - What's your primary goal for this project? (Long Text)
   - Describe your current process (Long Text)
   - What does success look like? (Long Text)
4. **Timeline & Budget**
   - Desired Start Date (Date field)
   - Project Timeline (Multiple Choice: ASAP, 1-3 months, 3-6 months, 6+ months)
   - Budget Range (Multiple Choice: $5k-$10k, $10k-$25k, $25k-$50k, $50k+, Not Sure Yet)
5. **Additional Context**
   - How did you hear about us? (Multiple Choice)
   - Anything else we should know? (Long Text)

Pro Tip: In Typeform settings, enable "Email notification" so you get alerted when someone submits.

Part 2: Build the n8n Workflow (45-60 minutes)

Create a New Workflow in n8n:

1. Log into n8n
2. Click "Create New Workflow"
3. Name it "Client Intake Automation"

Node 1: Typeform Trigger

- Click the "+" button
- Search for "Typeform"
- Select "Typeform Trigger"
- Click "Create New Credential"
- Get your Typeform API token from Typeform Settings > Developer
- Paste it in n8n
- Select your intake form from the dropdown
- Set "Trigger On" to "Form Response"
- Click "Execute Node" to test

Node 2: OpenAI - Generate Personalized Welcome Message

- Add new node: Search "OpenAI"
- Select "OpenAI"
- Create credential with your OpenAI API key
- Resource: "Text"
- Operation: "Message" (for GPT-4) or "Complete" (for GPT-3.5)
- Model: "gpt-4" or "gpt-3.5-turbo"
- In the "Messages" or "Prompt" field, use this:

You are a professional client success manager. Based on the following client intake information, write a warm, personalized welcome message that:

1. Acknowledges their specific challenges
2. Summarizes their goals in 2-3 sentences
3. Confirms the timeline and next steps
4. Sets a professional yet friendly tone

Client Information:
- Company: {{ $json.company_name }}
- Industry: {{ $json.industry }}
- Challenge: {{ $json.challenges }}
- Goal: {{ $json.primary_goal }}
- Timeline: {{ $json.project_timeline }}
- Budget: {{ $json.budget_range }}

Write the welcome message in first person as if you're writing it directly to them. Keep it to 3-4 short paragraphs.

Note: Adjust the field names (company_name, industry, etc.) to match your exact Typeform field IDs. You can see these by clicking "Show Expression" in n8n.

Node 3: Pipedrive - Create Person

- Add node: "Pipedrive"
- Operation: "Create"
- Resource: "Person"
- Map fields:
    - Name: `{{ $node["Typeform Trigger"].json["primary_contact_name"] }}`
    - Email: `{{ $node["Typeform Trigger"].json["email_address"] }}`
    - Phone: `{{ $node["Typeform Trigger"].json["phone_number"] }}`
- Add any custom fields you need

Node 4: Pipedrive - Create Organization

- Add node: "Pipedrive"
- Operation: "Create"
- Resource: "Organization"
- Map fields:
    - Name: `{{ $node["Typeform Trigger"].json["company_name"] }}`
    - Website: `{{ $node["Typeform Trigger"].json["website_url"] }}`

Node 5: Pipedrive - Create Deal

- Add node: "Pipedrive"
- Operation: "Create"
- Resource: "Deal"
- Map fields:
    - Title: `{{ $node["Typeform Trigger"].json["company_name"] }} - New Client Intake`
    - Person ID: `{{ $node["Pipedrive - Create Person"].json["id"] }}`
    - Organization ID: `{{ $node["Pipedrive - Create Organization"].json["id"] }}`
    - Value: Use an IF node or Code node to convert budget text to numbers
    - Stage: Select "Client Onboarded" stage
    - Expected Close Date: `{{ $node["Typeform Trigger"].json["desired_start_date"] }}`

Node 6: ClickUp - Create Folder

- Add node: "ClickUp"
- Create credential with your ClickUp API token (get from ClickUp Settings > Apps)
- Resource: "Folder"
- Operation: "Create"
- Select your Space ID

- Name: `{{ $node["Typeform Trigger"].json["company_name"] }} - Client Project`

Node 7: ClickUp - Create List

- Add node: "ClickUp"
- Resource: "List"
- Operation: "Create"
- Folder ID: `{{ $node["ClickUp - Create Folder"].json["id"] }}`
- Name: "Onboarding Checklist"

Node 8-12: ClickUp - Create Onboarding Tasks You'll create 5 separate ClickUp nodes, one for each standard task:

For each task node:

- Resource: "Task"
- Operation: "Create"
- List ID: `{{ $node["ClickUp - Create List"].json["id"] }}`
- Name: [Task name below]
- Assignees: [Team member ID]
- Due Date: Use expressions like `{{ $now.plus({days: 1}).toISO() }}`

Create these 5 tasks:

1. "Review client intake form" (Due: today, Assigned to: Project Manager)
2. "Schedule kick-off call" (Due: +2 days, Assigned to: Project Manager)
3. "Send contract and onboarding documents" (Due: +1 day, Assigned to: Admin)
4. "Complete discovery session" (Due: +5 days, Assigned to: Project Manager)
5. "Deliver project roadmap" (Due: +7 days, Assigned to: Project Manager)

Node 13: ClickUp - Create Client Details Task

- Add node: "ClickUp"
- Resource: "Task"
- Operation: "Create"
- List ID: `{{ $node["ClickUp - Create List"].json["id"] }}`
- Name: `Review Intake: {{ $node["Typeform Trigger"].json["company_name"] }}`
- Description: Use a Code node before this to format all Typeform responses nicely
- Priority: 1 (Urgent)
- Due Date: `{{ $now.toISO() }}`
- Assignees: Your project manager's ClickUp ID

Node 14: Gmail - Create Draft Email

- Add node: "Gmail"
- Operation: "Create Draft"
- To: your-project-manager@youragency.com
- Subject: `New Client: {{ $node["Typeform Trigger"].json["company_name"] }} - Welcome Email Ready for Review`
- Message (HTML):

<p>Hi [Project Manager Name],</p>

<p>We have a new client submission from {{ $node["Typeform Trigger"].json["company_name"] }}. I've drafted a personalized welcome message for your review.</p>

<h3>CLIENT SNAPSHOT:</h3>

Company: {{ $node["Typeform Trigger"].json["company_name"] }}
Contact: {{ $node["Typeform Trigger"].json["primary_contact_name"] }} ({{ $node["Typeform Trigger"].json["email_address"] }})
Timeline: {{ $node["Typeform Trigger"].json["project_timeline"] }}
Budget: {{ $node["Typeform Trigger"].json["budget_range"] }}

<h3>DRAFTED WELCOME MESSAGE:</h3>
<p>{{ $node["OpenAI"].json["choices"][0]["message"]["content"] }}</p>

<h3>WHAT'S BEEN SET UP:</h3>

✓ Pipedrive deal created and set to "Client Onboarded"
✓ ClickUp project folder created with onboarding checklist
✓ All standard tasks assigned

<h3>ACTION NEEDED:</h3>
<p>Please review the welcome message above, make any tweaks, and send it to the client from your email.</p>

<p>All client details are in ClickUp and Pipedrive.</p>

Node 15: Gmail - Send Team Notification

- Add node: "Gmail"
- Operation: "Send Email"
- To: team@youragency.com

- Subject: 🎉 `New Client: {{ $node["Typeform Trigger"].json["company_name"] }}`
- Message: Quick summary that new client came in with key details

Connecting Your Nodes

In n8n, you'll see small dots on each node. Click and drag from the output dot of one node to the input dot of the next. Your flow should look like this:

```
Typeform Trigger → OpenAI → Pipedrive Person → Pipedrive Org → Pipedrive Deal
                                              ↓
                                        ClickUp Folder
                                              ↓
                                        ClickUp List
                                              ↓
                                    (5 Task Creation Nodes)
                                              ↓
                                      Client Details Task
                                              ↓
                                  Gmail Draft → Gmail Team Email
```

Testing Your Workflow

1. Click "Execute Workflow" at the top right
2. Submit a test Typeform (use fake data)
3. Watch the execution in n8n (you'll see each node light up green as it completes)
4. Check Pipedrive for the new deal
5. Check ClickUp for the new folder and tasks
6. Check Gmail for the draft email

Activating Your Workflow

Once tested:

1. Click the toggle at the top of the workflow to "Active"
2. n8n will now automatically run this workflow every time someone submits your Typeform

What This Saves You

Before: 2-3 hours of manual data entry, email drafting, and task creation per client

After: 2 minutes to review the AI-drafted email and click send

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Workflow 2: Automated Meeting Intelligence

What You'll Need

- **Fireflies.ai** (Free plan available, Pro: $10/user/month recommended)
- **n8n** (same account as above)
- **ClickUp** (your existing account)
- **Gmail** (your existing account)

Why Fireflies.ai?

It integrates seamlessly with Google Meet, has excellent AI features, and can send webhooks to n8n for powerful automation.

Step-by-Step Setup

Part 1: Set Up Fireflies (15 minutes)

1. **Sign up at Fireflies.ai**
2. **Connect your Google Calendar**
   - Go to Settings > Integrations
   - Click "Connect Google Calendar"
   - Authorize access
3. **Configure Meeting Settings**
   - Go to Settings > Recording
   - Enable "Auto-join meetings"
   - Choose which meetings to join (recommend "All meetings")
4. **Enable AI Features**
   - Go to Settings > AI Apps
   - Enable "Action Items"
   - Enable "Questions"
   - Enable "Key Topics"

Part 2: Build the n8n Workflow (30 minutes)

Create New Workflow:

1. In n8n, create new workflow
2. Name it "Meeting Intelligence Automation"

Node 1: Webhook Trigger

- Add node: "Webhook"
- Set Webhook name to something memorable like "fireflies-meeting"
- HTTP Method: POST

- Copy the webhook URL (you'll need this for Fireflies)

Node 2: Set Variables

- Add node: "Set"
- This node extracts key data from the Fireflies webhook
- Add these fields:
  - meeting_title: `{{ $json.body.title }}`
  - meeting_date: `{{ $json.body.date }}`
  - transcript_url: `{{ $json.body.transcript_url }}`
  - summary: `{{ $json.body.summary }}`
  - action_items: `{{ $json.body.action_items }}`
  - participants: `{{ $json.body.participants }}`

Node 3: Split Out Action Items

- Add node: "Split Out"
- Mode: "Split Out Items"
- Field to Split Out: `{{ $json.action_items }}`

This creates a separate execution for each action item.

Node 4: Function - Parse Action Item Details

- Add node: "Code"
- Mode: "Run Once for Each Item"
- JavaScript Code:

javascript
```
// Extract assignee from action item text
const actionItem = $input.item.json;
const text = actionItem.text || actionItem.description || '';

// Try to find a name in the action item
const namePattern = /(?:@|assign(?:ed)?\s+to\s+)(\w+)/i;
const match = text.match(namePattern);
const assignee = match ? match[1] : null;

// Try to extract due date
const datePattern = /(?:by|due|before)\s+(\w+\s+\d{1,2})/i;
const dateMatch = text.match(datePattern);
const dueDate = dateMatch ? dateMatch[1] : null;

return {
  json: {
```

```
   task_name: text,
   assignee: assignee,
   due_date: dueDate,
   original_action_item: actionItem
 }
};
```

Node 5: ClickUp - Create Task for Action Item

- Add node: "ClickUp"
- Resource: "Task"
- Operation: "Create"
- List: Select your "Meeting Action Items" list (create this in ClickUp first)
- Name: `{{ $json.task_name }}`
- Description: `From meeting: {{ $node["Set"].json.meeting_title }}\nTranscript: {{ $node["Set"].json.transcript_url }}`
- Due Date: `{{ $json.due_date || $now.plus({days: 3}).toISO() }}`
- Priority: 2 (High)
- Assignees: Map based on the assignee name (you may need to create a mapping in a previous node)

Node 6: Wait for All Action Items

- Add node: "Aggregate"
- This node waits until all action items have been processed
- Aggregate: "All Items"

Node 7: ClickUp - Create Summary Task

- Add node: "ClickUp"
- Resource: "Task"
- Operation: "Create"
- List: Same "Meeting Action Items" list
- Name: `{{ $node["Set"].json.meeting_title }} - Meeting Summary`
- Description: Include full summary and link to transcript
- Priority: 3 (Normal)
- Custom Fields: Add meeting date

Node 8: Gmail - Send Meeting Summary

- Add node: "Gmail"
- Operation: "Send Email"
- To: Extract participants' emails from the Fireflies data
- Subject: `Meeting Summary: {{ $node["Set"].json.meeting_title }}`

- Message (HTML):

```html
<h2>Meeting Summary: {{ $node["Set"].json.meeting_title }}</h2>
<p><strong>Date:</strong> {{ $node["Set"].json.meeting_date }}</p>

<h3>Summary:</h3>
<p>{{ $node["Set"].json.summary }}</p>

<h3>Action Items:</h3>
<ul>
{{ $node["Split Out"].json.map(item => `<li>${item.text}</li>`).join('') }}
</ul>

<p><a href="{{ $node["Set"].json.transcript_url }}">View Full Transcript</a></p>


<p>All action items have been created in ClickUp.</p>
```

Part 3: Connect Fireflies to n8n

1. In Fireflies, go to Settings > Integrations > Webhooks
2. Click "Add Webhook"
3. Paste your n8n webhook URL
4. Select trigger: "Meeting Completed"
5. Test the webhook (Fireflies will send test data)
6. Check n8n to see if it received the test

Part 4: Workflow Structure

Your n8n workflow should look like:

```
Webhook (Fireflies)
   ↓
Set Variables
   ↓
Split Out (Action Items)
   ↓
Code (Parse Details)
   ↓
ClickUp (Create Task) ← runs once per action item
   ↓
Aggregate (Wait for all)
   ↓
ClickUp (Summary Task)
   ↓
```

Gmail (Send Summary)

Meeting Workflow in Action

Before the Meeting:

1. Schedule meeting in Google Calendar
2. Fireflies automatically gets invited

During the Meeting:

1. Fireflies joins and records
2. You focus 100% on the conversation

After the Meeting (Automatic):

1. Fireflies transcribes (ready in 3-5 minutes)
2. Sends webhook to n8n
3. n8n creates tasks in ClickUp
4. Email summary sent to participants
5. You're notified everything is ready

Pro Tips for Better Results

During Meetings, Be Clear:

- Say names when assigning: "Sarah, can you send the proposal by Friday?"
- Be explicit: "Action item: schedule follow-up call"
- Summarize decisions: "So we've decided option B"

What This Saves You

Before: 30-45 minutes per meeting on notes, summaries, and task creation

After: 2-minute review of auto-generated tasks

Workflow 3: Content Multiplier System

What You'll Need

- **Descript** (Free plan available, Creator: $24/month recommended)
- **OpusClip** (Free: 60 minutes/month, Pro: $29/month for 300 minutes)
- **n8n** (same account)

- **Buffer or Later.com** for scheduling
- **Canva** (optional, for thumbnails)

Step-by-Step Setup

Part 1: Record Your Long-Form Content (1 hour)

Video Content Ideas:

- Client success story walkthrough (15-20 min)
- "How we solved [specific problem]" case study
- Industry insight or trend analysis
- Behind-the-scenes of your process
- Q&A answering common client questions
- Weekly founder update

Recording Best Practices:

- Use your phone or webcam
- Record in quiet space with good lighting
- Look at the camera
- Speak in short, punchy sentences
- Drop "golden nuggets" throughout
- Don't worry about perfection

Storage:

- Save raw video in Google Drive or Dropbox
- Folder structure: `/Content Library/Raw Videos/[Date]`

Part 2: Process Video in Descript (20 minutes)

1. **Upload to Descript**
   - Drag video file into Descript
   - Auto-transcribes in 5-10 minutes
2. **Clean Up**
   - Use "Remove Filler Words"
   - Use "Shorten Word Gaps"
   - Fix transcription errors
   - Add punctuation
3. **Create Formats: Full Video Export:**
   - Export as 1080p MP4 for YouTube
4. **Audiogram (LinkedIn):**
   - Select 60-90 seconds of best content
   - Publish > Audiogram

- Choose template with captions
- Export as square (1:1)

5. **Blog Post:**
    - Export cleaned transcript
    - Use as blog foundation
6. **LinkedIn Article:**
    - Feed transcript to ChatGPT:

Convert this video transcript into a professional LinkedIn article.

Requirements:
- Write in first person
- Break into clear sections with headers
- Keep paragraphs short (2-3 sentences)
- Include a hook in first sentence
- End with clear call-to-action
- Keep conversational tone but polish it
- Length: 800-1200 words

Transcript:

[Paste cleaned transcript]

Part 3: Create Short Clips in OpusClip (5 minutes)

1. **Upload to OpusClip**
    - Go to OpusClip.ai
    - Upload long-form video
    - Choose genre: "Business/Marketing"
2. **Let AI Process** (10-15 minutes)
    - Analyzes video
    - Identifies 5-10 high-engagement moments
    - Creates clips in formats:
        - 16:9 (YouTube, LinkedIn)
        - 9:16 (Instagram Reels, Shorts)
        - 1:1 (Instagram Feed, LinkedIn)
3. **Review & Select**
    - OpusClip gives "virality score"
    - Review top 5 clips
    - Each has auto-captions and suggested titles
    - Download clips you want
4. **Customize Captions**
    - Edit in OpusClip editor
    - Adjust style, color, font
    - Add branding

Part 4: Create Thumbnails in Canva (15 minutes)

1. Open Canva
2. Choose "YouTube Thumbnail"
3. Use video screenshot as background
4. Add bold text with key insight
5. Include logo
6. Export as PNG

Part 5: Automate Scheduling with n8n (Advanced)

Create New Workflow: "Content Distribution"

Node 1: Google Drive Trigger

- Add node: "Google Drive Trigger"
- Trigger on: "New File in Folder"
- Select your "Processed Videos" folder
- File type: MP4

Node 2: Function - Generate Content Calendar

- Add node: "Code"
- Create schedule for when/where to post:

javascript

```
const videoFile = $input.first().json;
const fileName = videoFile.name;

// Create posting schedule
const schedule = [
  {
    platform: 'youtube',
    type: 'full_video',
    day: 'Monday',
    time: '09:00'
  },
  {
    platform: 'linkedin',
    type: 'audiogram',
    day: 'Monday',
    time: '10:00'
  },
  {
    platform: 'linkedin',
    type: 'article',
```

```
    day: 'Tuesday',
    time: '09:00'
  }
  // Add more schedule items
];

return schedule.map(item => ({
  json: {
    ...item,
    video_file: videoFile,
    file_name: fileName
  }
}));
```

Node 3: Split Items

- Split each scheduled post into separate executions

Node 4: Switch - Route by Platform

- Add node: "Switch"
- Mode: "Rules"
- Create rules for each platform

Node 5a: Buffer - Schedule LinkedIn Post

- Add node: "HTTP Request"
- Method: POST
- URL: Buffer API endpoint
- Authentication: Use Buffer API token
- Body: Include caption and media

Node 5b: YouTube API - Upload Video

- Add node: "HTTP Request"
- Method: POST
- URL: YouTube Data API
- Upload video with title and description

Node 5c: Instagram - Schedule via Buffer/Later

- Similar to 5a

Simpler Alternative: Manual Scheduling

If n8n automation feels too complex, use Buffer or Later.com manually:

Weekly Schedule:

Day	Platform	Content Type	Source
Monday	YouTube	Full video	Original
Monday	LinkedIn	Audiogram	Descript
Tuesday	LinkedIn	Article	Transcript + ChatGPT
Wednesday	Instagram	Reel	OpusClip #1
Wednesday	LinkedIn	Short clip	OpusClip #2
Thursday	YouTube Shorts	Vertical	OpusClip #3
Friday	Instagram	Reel	OpusClip #4
Friday	LinkedIn	YouTube link	With commentary

Your Weekly Content Routine

Monday Morning (1 hour):

1. Record 20-minute video
2. Upload to Descript
3. Start transcription

Monday Afternoon (30 minutes): 4. Clean transcript in Descript 5. Export audiogram 6. Upload to OpusClip 7. Export transcript

Tuesday Morning (30 minutes): 8. Feed transcript to ChatGPT 9. Review and edit blog 10. Download OpusClip clips 11. Select top 5

Tuesday Afternoon (30 minutes): 12. Create thumbnails 13. Schedule in Buffer/Later 14. Upload YouTube video

Total: 2.5 hours for entire week of content

What This Saves You

Before: 10-15 hours per week creating content from scratch

After: 2.5 hours per week for 10+ pieces of content

Quick Start Checklist

Week 1: Client Intake (Priority 1)

- Sign up for n8n (Cloud or self-hosted)
- Build Typeform intake form
- Get OpenAI API key
- Build n8n workflow
- Test with fake submission
- Update website with Typeform link
- Archive old intake process

Week 2: Meeting Intelligence (Priority 2)

- Sign up for Fireflies.ai
- Connect Google Calendar
- Create "Meeting Action Items" list in ClickUp
- Build n8n workflow
- Configure Fireflies webhook
- Test with internal meeting
- Train team on process

Week 3: Content Multiplier (Priority 3)

- Sign up for Descript and OpusClip
- Record first long-form video
- Process through both tools
- Schedule first week of content
- Set up Buffer or Later
- Block "Content Creation Monday"

Week 4: Optimize Everything

- Review what's working
- Fix any broken integrations
- Adjust n8n workflows
- Get team feedback
- Document processes

Troubleshooting Common Issues

"n8n workflow failed"

- Check execution logs in n8n
- Look for red X on specific node
- Usually a field mapping or credential issue
- Test each node individually

"Fireflies didn't join meeting"

- Check Google Calendar connection
- Ensure auto-join enabled
- Meeting needs to be on calendar 5+ minutes before start

"OpusClip clips aren't good"

- Source video lacks standalone moments
- Be more emphatic, pause between points
- Look for strong, clear statements

"Feeling overwhelmed"

- Start with ONE workflow
- Run it for 2 weeks
- Then add next one
- Don't rush

Cost Summary

Monthly Costs:

- n8n Cloud: $20/month (or $5-20/month self-hosted)
- OpenAI API: ~$5-10/month
- Fireflies.ai Pro: $10/month
- Descript Creator: $24/month
- OpusClip Pro: $29/month
- Buffer/Later: $6-15/month

Total: ~$94-108/month

With self-hosted n8n: ~$79-103/month

ROI: If these save 15 hours/week and your time is worth $100/hour, you're saving $6,000/month for a $100 investment.

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n8n Pro Tips

Use Credentials Manager: Store all API keys securely in n8n's credential manager. Never hardcode them.

Error Handling: Add "Error Trigger" nodes to catch failed workflows and send you alerts.

Testing: Always use n8n's "Execute Node" feature to test each step before activating.

Workflow Organization: Use Sticky Notes in n8n to document sections of complex workflows.

Version Control: Export your workflows as JSON and save them in Git for backup.

Next Steps

You now have complete n8n blueprints for all three workflows. Start with Client Intake—highest immediate ROI and proves the value of automation.

Need help implementing? We build these n8n workflows for clients in less than a week, customized to your exact business needs. Book a free automation assessment.