ILLUSTRATIVE DEMONSTRATION - sample numbers, not verified client outcomes.

Preserved sample content below. Redacted-client wording does not establish a verified engagement.

[redacted]

3-MINUTE QUICK START GUIDE

Get to your first useful result fast.

A short onboarding guide for new customers who want clarity before complexity. One outcome. One setup. One measurable first win.

01

Choose one outcome

02

Connect one source

03

Activate one workflow

Designed to be read in about three minutes.

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1. Start with the outcome, not the features.

Pick the one result that would make the next seven days feel meaningfully better.

A

See what is working

Bring the key numbers into one view so the team can stop guessing.

B

Reduce follow-up work

Automate one repetitive step while keeping a clear human handoff.

C

Create a cleaner pipeline

Move new leads into one consistent qualification and next-step process.

RULE OF THUMB

Do not set up everything. Set up the first thing you will actually use.

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2. Connect one source. Activate one workflow.

The fastest onboarding path is intentionally narrow.



Connect
Choose the source you already trust.

Map
Decide what should happen next.

Test
Run one real example end to end.

Measure
Confirm the result is visible.

Your first-session checklist

- [ ] One business outcome selected
- [ ] One source connected
- [ ] One workflow turned on
- [ ] One test completed
- [ ] One number you can check tomorrow

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3. Know what “working” looks like tomorrow.

Your first win should be observable, not theoretical.

1 **INPUT**

A lead, order, customer, task or event enters correctly.

2 **ACTION**

The intended workflow happens without manual chasing.

3 **OUTPUT**

You can see the result in the place the team already works.

You are ready for the next layer when the first one is boring.

Once the first workflow is reliable, add the second. Then the third.

That keeps implementation understandable, measurable and easier to improve.

CONTINUE TO YOUR WORKSPACE