



All workflows

Ready-made AI automation agents for sales, marketing, support and finance — with process, requirements and customisation options.

9 WORKFLOWS Version 1.0 · October 2026 · switech-solution.com

This document brings together all nine SwiTech Solution workflows. Each workflow is an AI-powered agent that handles a recurring task in the background — from finding new leads to sending payment reminders.

All workflows follow the same principles: they are adapted to the tools you already use, only access the data they need, and leave the important decisions to you.



PRINCIPLES BEHIND EVERY WORKFLOW

Adapted to your tools

The workflows work with the tools you already use — for example Gmail, Notion or Airtable.

Only the access needed

Each workflow only gets the permissions it needs for its task.

You stay in control

Where it makes sense, you review results before anything is sent or published.

Documented and traceable

Every workflow is documented so it is clear what happens and when.

OVERVIEW

WORKFLOW	AREA	TRIGGER	RESULT
Lead Research Agent	Sales	Manually or on a schedule, e.g. weekly	Prioritised lead list in your Notion database
Follow-up Agent	Sales	Daily check of your open contacts	Personal follow-up emails from your own inbox
CRM Update Agent	Sales	A new reply from a lead in your inbox	Up-to-date contact in your CRM with status and summary
Content Agent	Marketing	Weekly, on a fixed day	Three LinkedIn post drafts for your approval
Social Media Scheduler	Marketing	An approved post in your content calendar	Posts published on all connected platforms
Onboarding Agent	Support	A new sign-up for your product or offer	A personal welcome sequence for every new user
Customer Support Agent	Support	A new request in your support inbox	Fast answers to common questions, complex cases go to you
Invoice Tracking Agent	Finance	Daily check of your open invoices	Automatic payment reminders and a clear overview
Cost Monitoring Agent	Finance	Monthly, e.g. at the end of the month	Monthly report on tool costs compared with your budget

1 SALES



01 · SALES

Lead Research Agent

Automatically finds and qualifies new leads from Google Maps and LinkedIn. Results saved directly to Notion.

1

Define your audience

Set industry, region and criteria.

2

Find companies

Collect public company data from Google Maps and LinkedIn.

3

Clean the data

Fill in details and remove duplicates.

4

Qualify leads

AI scores every lead against your criteria.

5

Save to Notion

Qualified leads land in Notion, neatly structured.

TRIGGER Manually or on a schedule, e.g. weekly

INTEGRATIONS Google Maps, LinkedIn, Notion, AI model

RESULT Prioritised lead list in your Notion database

YOUR CONTROL You decide which leads to contact. The agent only researches and scores.



01 · SALES

Follow-up Agent

Monitors which leads have not responded in 5 days and sends a personalised follow-up email automatically.

1

Check daily

Open contacts are checked every day.

2

Spot silence

Find leads with no reply for 5 days.

3

Write the follow-up

AI writes a personal follow-up.

4

Send from your inbox

Sent from your own address.

5

Track the status

Log the send, stop on reply.

TRIGGER Daily check of your open contacts

INTEGRATIONS Gmail / Outlook, Notion / CRM, AI model

RESULT Personal follow-up emails from your own inbox

YOUR CONTROL You choose whether follow-ups go out automatically or only after your approval.



01 · SALES

CRM Update Agent

Updates your CRM automatically when a lead replies to your email. No manual entry needed.

1

Detect the reply

A lead's reply arrives in your inbox.

2

Match the contact

The sender is matched to the right record.

3

Read the reply

AI summarises and detects the intent.

4

Update the CRM

Status, activity and note are set.

5

Notify you

Important replies trigger a notification.

TRIGGER A new reply from a lead in your inbox

INTEGRATIONS Gmail / Outlook, Notion, Airtable, AI model

RESULT Up-to-date contact in your CRM with status and summary

YOUR CONTROL You see every change in the CRM and can correct it at any time.

2 MARKETING



02 · MARKETING Content Agent

Generates three LinkedIn post drafts per week based on industry news and your product updates.



1 Collect topics

Read industry news and your product updates.

2 Pick what matters

AI selects the most relevant topics.

3 Write drafts

Three LinkedIn posts in your tone of voice.

4 Deliver

Drafts land in Notion or in your inbox.

5 Approve

You edit and approve.

TRIGGER Weekly, on a fixed day

RESULT Three LinkedIn post drafts for your approval

INTEGRATIONS News sources / RSS, Notion, Email, AI model

YOUR CONTROL Every post is only published after you have reviewed and approved it.



02 · MARKETING Social Media Scheduler

Schedules and publishes posts across platforms automatically at optimal times.



1 Plan

Add posts to your content calendar.

2 Adapt per platform

Adjust format, length and hashtags.

3 Pick the time

Publish at the times you set.

4 Publish

Automatically on every connected channel.

5 Confirm

Status and link go back into the plan.

TRIGGER An approved post in your content calendar

RESULT Posts published on all connected platforms

INTEGRATIONS Notion / Airtable, LinkedIn, Instagram, other platforms

YOUR CONTROL Only posts with the status “approved” are published.

3 SUPPORT



03 · SUPPORT

Onboarding Agent

Sends a personalised welcome email sequence when a new user registers. Fully automated.

1

Detect the sign-up

A new user registers.

2

Say welcome

A personal welcome email right away.

3

Start the sequence

More emails at set intervals.

4

Tailor the content

Content adapts to their details.

5

Hand over to you

Replies and questions come to you.

TRIGGER A new sign-up for your product or offer

INTEGRATIONS Sign-up form / app, Gmail / email tool, Notion / Airtable

RESULT A personal welcome sequence for every new user

YOUR CONTROL You approve all texts in advance. The agent only sends what you signed off.



03 · SUPPORT

Customer Support Agent

Answers frequently asked questions automatically via email. Escalates complex issues to you.

1

Receive the request

A customer email arrives.

2

Classify

Detect topic and urgency.

3

Look it up

Answer from your FAQ and documents.

4

Reply

Common questions are answered directly.

5

Escalate

Complex cases go to you with a summary.

TRIGGER A new request in your support inbox

INTEGRATIONS Gmail / Outlook, FAQ / knowledge documents, AI model

RESULT Fast answers to common questions, complex cases go to you

YOUR CONTROL You decide which questions the agent may answer on its own.

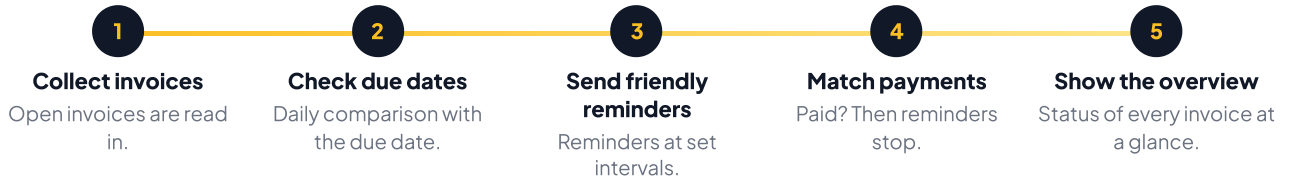
4 FINANCE



04 · FINANCE

Invoice Tracking Agent

Monitors outstanding invoices and sends automatic payment reminders at defined intervals.



TRIGGER Daily check of your open invoices

INTEGRATIONS Accounting / invoice list, Gmail / Outlook, Notion / Airtable

RESULT Automatic payment reminders and a clear overview

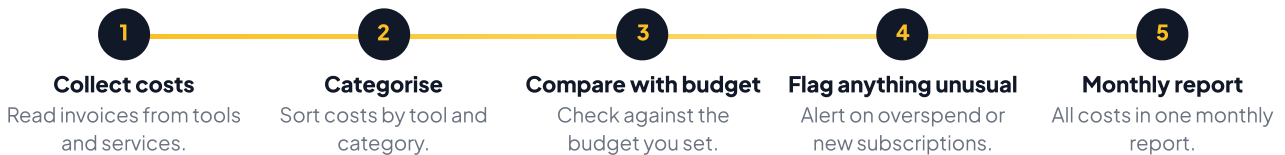
YOUR CONTROL You can exclude clients and approve every reminder in advance.



04 · FINANCE

Cost Monitoring Agent

Tracks monthly tool and service costs and compares them against your defined budget.



TRIGGER Monthly, e.g. at the end of the month

INTEGRATIONS Email invoices, Google Sheets / Airtable, Notion, AI model

RESULT Monthly report on tool costs compared with your budget

YOUR CONTROL The agent only flags and reports. Cancellations and decisions are yours.

This describes the typical process. Every workflow is adapted to your tools, processes and requirements during the project; details and pricing are agreed individually.

Which workflow fits you?

In a free intro call we look at how the workflow can be adapted to your tools.

[Book an intro call](#)