

Case Study: Automating Personalized AI Workflow Suggestions with Tally and Zapier

The Challenge:

Small business owners and freelancers often find the plethora of AI tools overwhelming, with complex jargon and numerous applications making it difficult to determine where to start.

The Solution:

Transformative AI Solutions developed a streamlined system to provide users with personalized AI workflow suggestions:

1. User Input via Tally.so Form:

- Users provide their profession or role.
- Indicate the cloud-based tools they currently use (e.g., Gmail, Slack, Notion).
- Describe current pain points (e.g., repetitive tasks, scheduling).

2. Automated Processing with Zapier and Gemini AI:

- Zapier captures the form submissions and routes the data to Gemini AI.
- Gemini AI generates 2–3 tailored AI automation suggestions based on the user's input.

3. Personalized Email Delivery:

- Zapier sends a customized email to the user, detailing the AI workflow suggestions.
- The email includes a call-to-action to contact Transformative AI Solutions for implementation assistance.

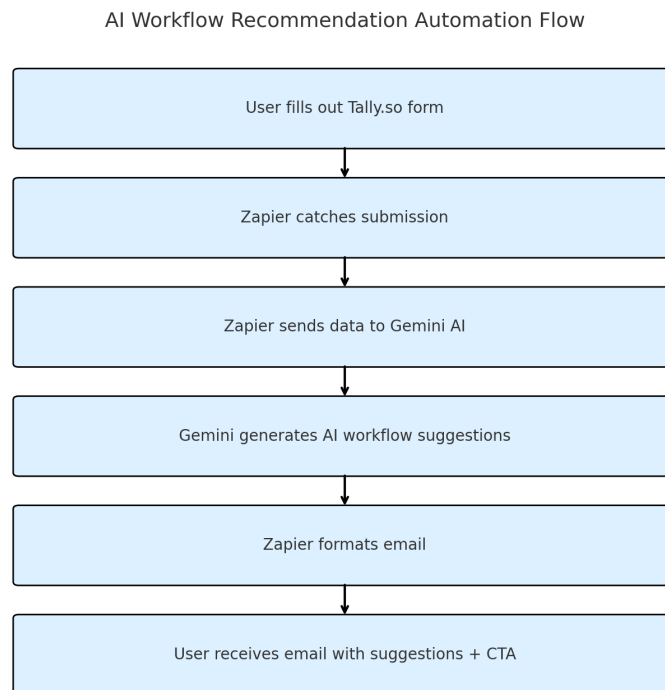
Tools Utilized:

- **Tally.so:** For creating the user input form.
- **Zapier (Free Plan):** To automate data routing and email delivery.
- **Gemini AI:** To generate personalized AI workflow suggestions.
- **Gmail:** For sending customized emails.

- **Notion (Optional):** To log submissions for review and optimization.

Workflow Overview:

- **Step 1:** User completes the Tally.so form.
- **Step 2:** Zapier processes the data and sends it to Gemini AI.
- **Step 3:** Gemini AI creates personalized AI workflow suggestions.
- **Step 4:** Zapier sends the suggestions to the user via email.
- **Step 5:** Email includes a link to schedule a consultation with Transformative AI Solutions.



Conclusion:

This project showcases how combining simple tools like Tally and Zapier can create a powerful, automated onboarding experience that delivers immediate value to users while opening avenues for further engagement.

Interested in a Similar Solution?

Transformative AI Solutions offers custom automations tailored to various professions, helping businesses save time and enhance efficiency.