

Client Onboarding System

First AI Agent Prompt:

Can you generate a warm and professional welcome email for a new client based on the information provided? The message should be friendly, brief, and personalized—while still sounding professional. It should reflect the client's industry and their goals for our collaboration. Below is the client's information:

Name: {{ \$json.Name }}

Email: {{ \$json.Email }}

Company Industry: {{ \$json['Company Industry'] }}

Goals for the Partnership: {{ \$json['What do you want to achieve with us in 5 months?'] }}

Make sure to always end the email with the following sign-off:

Best regards,
Bob Bob
VP of Internal Relations
ABC Corp

Do not use placeholders like [Your Name] or [Your Contact Information] under any circumstances, even if some information is missing.

Return the result in 3 separate fields:

Subject: The email's subject line

Body: The main email content

Email: {{ \$json.Email }}

Second AI Agent Instructions:

Use the client details below to generate a clear summary of their profile. Here is the information provided:

Name:

Company Industry:

Goals with Us: What they are hoping to achieve through our partnership

Return the following fields separately:

Name:

Email:

Summary: A concise overview of the client based on the information provided above