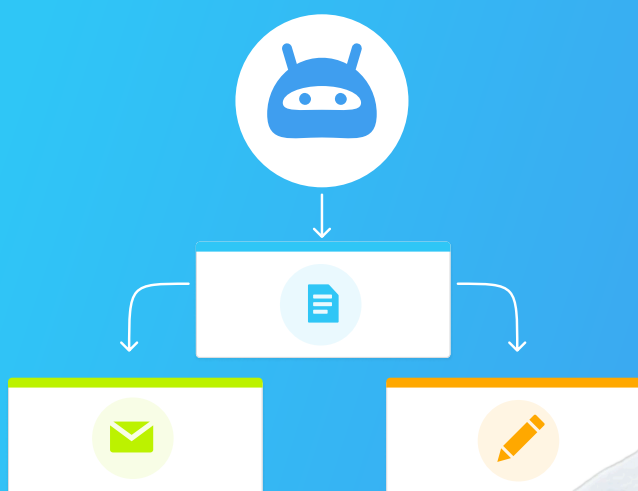


Bitrix24[®]

Setting up workflow automation for an architectural design studio



About the client

The client owns an architectural design studio, which employs more than 200 professional architects, designers, engineers and planners, united by a common philosophy and the desire to create unique and functional spaces.

Project name: Automating client management and documentation workflows

Completed in: 2025

Industry: construction/consulting

Bitrix24 edition: cloud



Project overview

Key challenges	How Bitrix24 helped to solve them
✗ Manual labor and inefficiency	✓ Automation of key workflow
✗ Poor transparency in project management	✓ Real-time access to information
✗ Fragmented communication	✓ Unified workspace + performance monitoring and reporting
✗ Inadequate customer interaction management	✓ Customer service automation

Post-implementation success metrics



30% reduction
in application
processing time



Fewer errors
due to centralized
data access



Improved
customer satisfaction

2.0x

Faster
response to client requests

Background

The client's initial concern was the **overwhelming amount of manual labor**, which led to **slow decision-making** and **extended approval workflows** that dragged down the overall project pacing.

The company's management was looking to **automate workflows** and **increase the transparency and efficiency** of project management and deadlines.

This could be potentially achieved by implementing a universal system that would allow the client to:

- bring together all the project stages (from estimate to completion) into a single workspace
- automate routine operations
- improve the quality of customer service

It was important to create a single platform that would provide access to all necessary information about current projects for all participants in the process. This would help **avoid misunderstandings, reduce the likelihood of errors** and **ensure a higher degree of responsibility** of employees for their tasks. Coincidentally, all the things listed above is exactly what Bitrix24 does as an online workspace.

In addition, the client requested that we automate their customer communication workflows, so that every customer could receive automated updates with information on their project status.

Implementation

The Bitrix24 implementation was done in several stages.



Stage 1. Analysis of current processes and needs

First, we ran an in-depth analysis of the company's workflows:

- lead processing
- project management
- interaction with clients
- internal communications
- document flow

After that, we singled out bottleneck areas – they became the first candidates for getting automated.



Stage 2. Adapting up Bitrix24 to the company's needs

We started the implementation process by setting up Bitrix24 CRM while also automating lead processing, project management, deadline management, integration with webmail and calendar, deal tracking, project status tracking, and so on.

This helped to streamline the deal and project management process, which in turn improved customer communication.



Stage 3. Automation of key workflows

The following workflows were automated:

- Receiving and processing requests from clients
- Distributing requests between sales assistants and departments
- Managing project stages: from idea to implementation
- Tracking deadlines and notifications about deadlines
- Keeping a history of interactions with clients
- Managing documents and communication with the team
- Reporting and analytics on key metrics

Managing project stages became more transparent, which allowed the team to control every stage: from the idea to completion. In addition, the system automatically tracks task deadlines and sends notifications about upcoming deadlines, which significantly reduces the risk of delays.

An important part of the implementation was maintaining a history of interactions with clients, which allowed the team to manage communications and documents more efficiently. A special reporting and analytics allowed the managers to track key metrics, which in turn enabled them to make more informed decisions based on the collected data.



Stage 4. Employee training and system launch

Next up was employee training, which included customer service specialists, designers, the project support department, and the accounting department. This helped to ensure a **smooth integration of the system into everyday work.**

An important aspect of the training was creating a friendly environment where employees could ask questions and engage in product-related discussions, which contributed to better understanding of Bitrix24.



Results

The implementation of Bitrix24 significantly changed the company's approach to project management, creating a **unified online workspace** in which all employees have access to relevant information

The system was implemented and launched without a hitch, and employees quickly adapted to the new working conditions. The integration of Bitrix24 into the team's daily activities allowed for a **significant increase in the level of mutual understanding** between departments and improved customer service.

The implementation streamlined such important business processes as **receiving requests, assigning a client** to a particular sales associate, and **step-by-step tracking** of the process of working with a client. Now each employee has access to the necessary information in real time, which allows for a faster response to requests and changing working conditions.

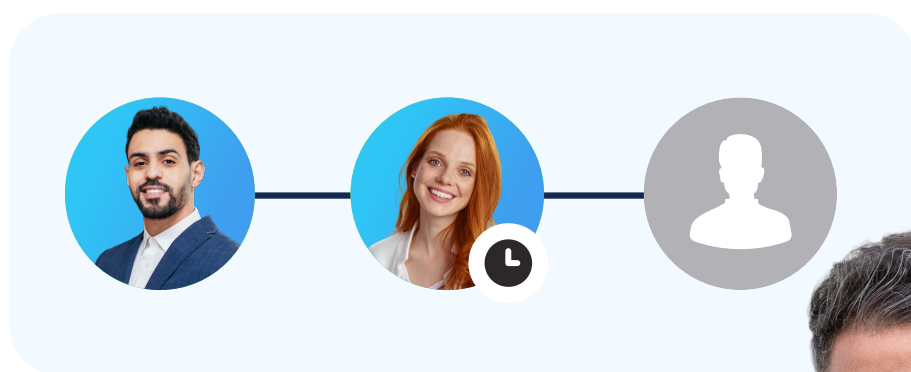
The implementation of the system not only increased the transparency of processes, but also significantly reduced the number of errors that could occur due to unavailability of data. In addition, automation of work allowed for a reduction in the processing time of applications by 30%, which in turn increased the speed of the company's response to customer requests.

Improving communication between departments was another important milestone in the company's development. Bitrix24 became the company's information hub, which facilitated faster decision-making and reduced delays due to lack of interaction.

All these changes had a positive impact on customer satisfaction. Thanks to faster and better service, customers became more satisfied with the company's work, which in turn strengthened its reputation in the architectural and design services market.

Summary

As a result, the integration of Bitrix24 not only optimized internal processes, but also significantly improved interaction with customers, which became the key to successful business development.



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Contact a local Bitrix24 partner for product
demo and consultation.

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