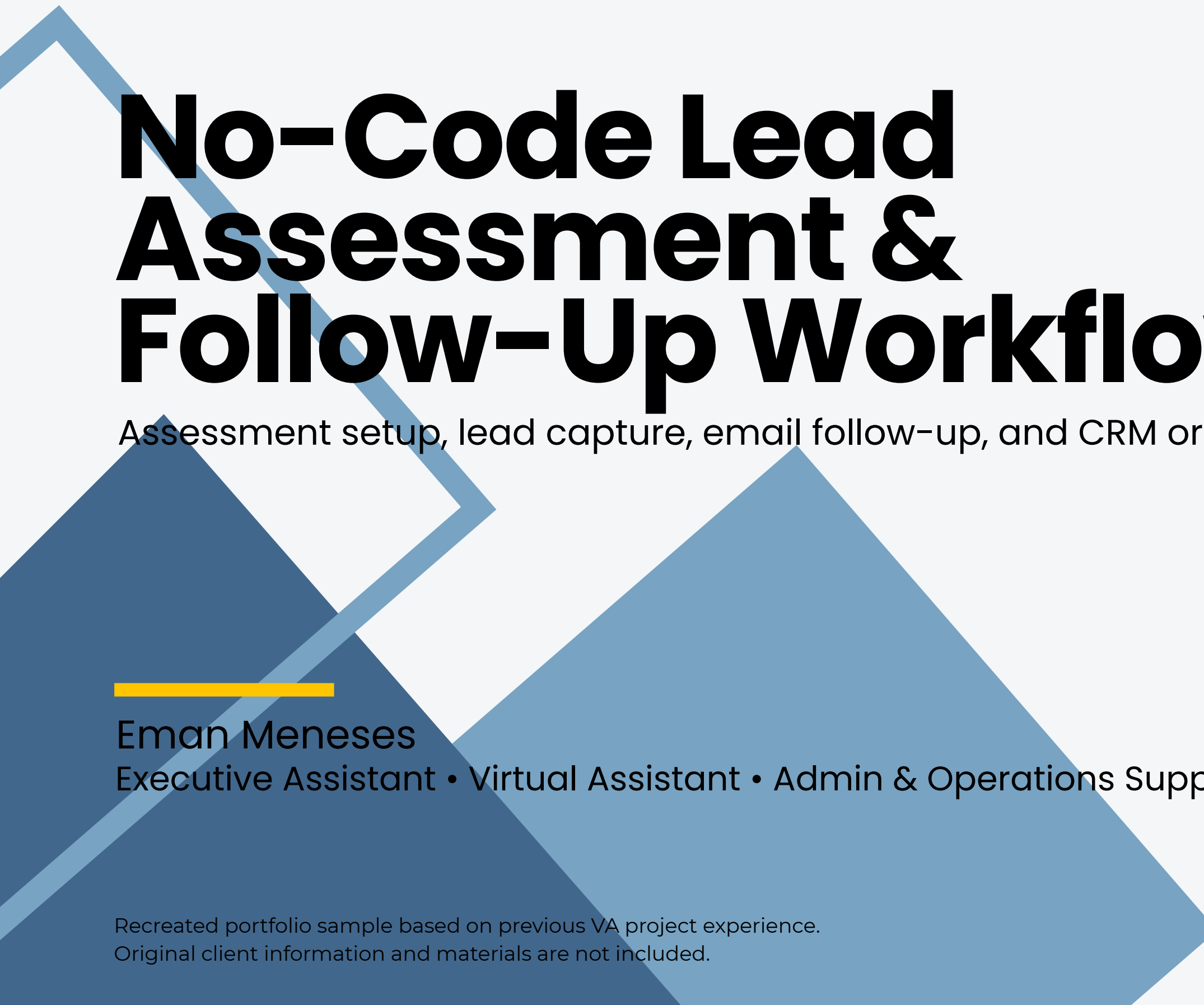
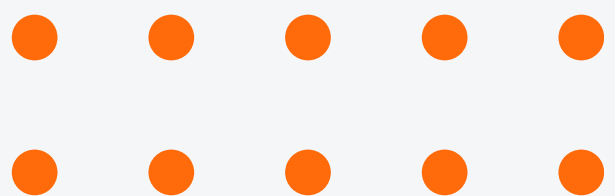




PORTFOLIO CASE STUDY

No-Code Lead Assessment & Follow-Up Workflow

Assessment setup, lead capture, email follow-up, and CRM organization



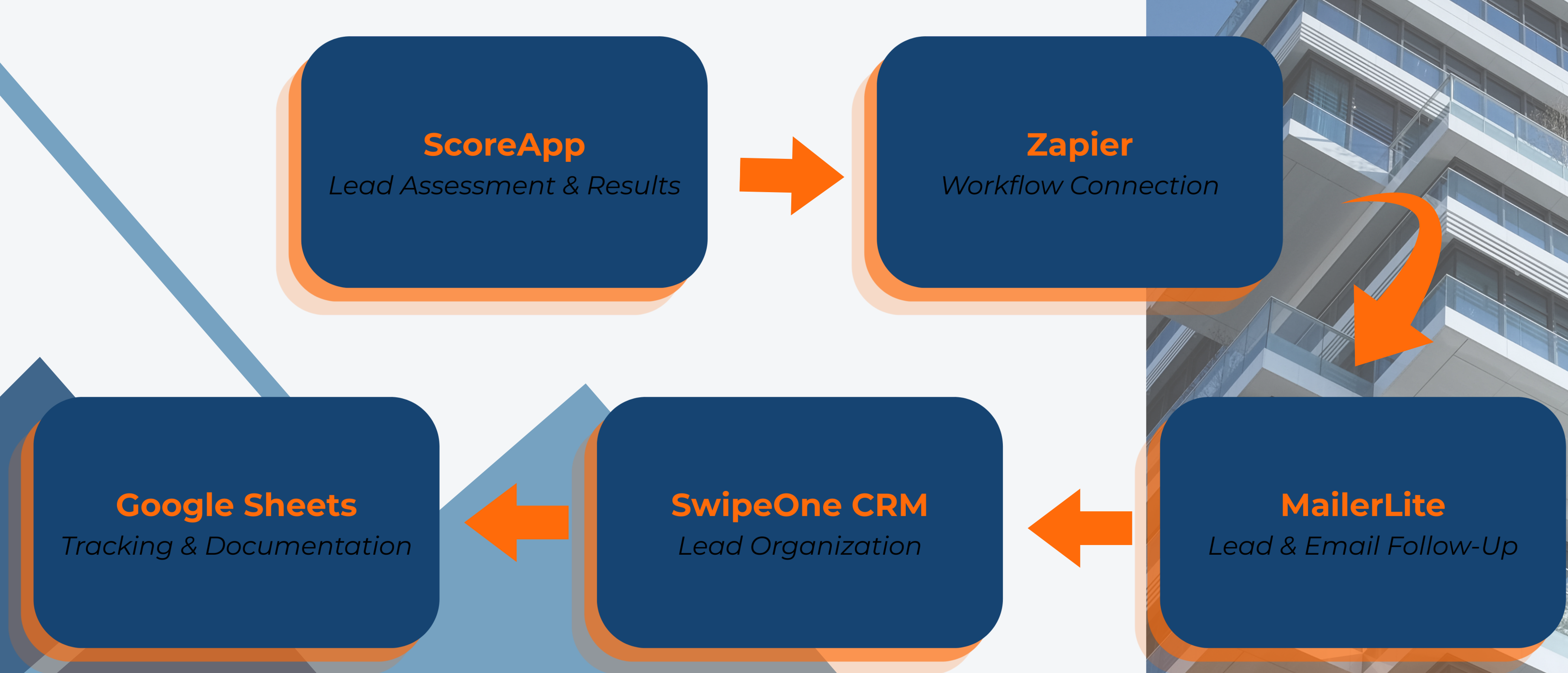
Eman Meneses

Executive Assistant • Virtual Assistant • Admin & Operations Support

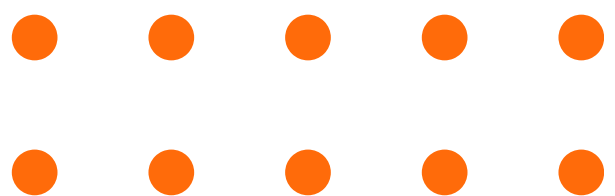
Recreated portfolio sample based on previous VA project experience.
Original client information and materials are not included.



How the Workflow Worked



The goal was to create a simple workflow that collected assessment responses, organized lead information, and supported follow-up through email and CRM tools.



What I Did

My Role

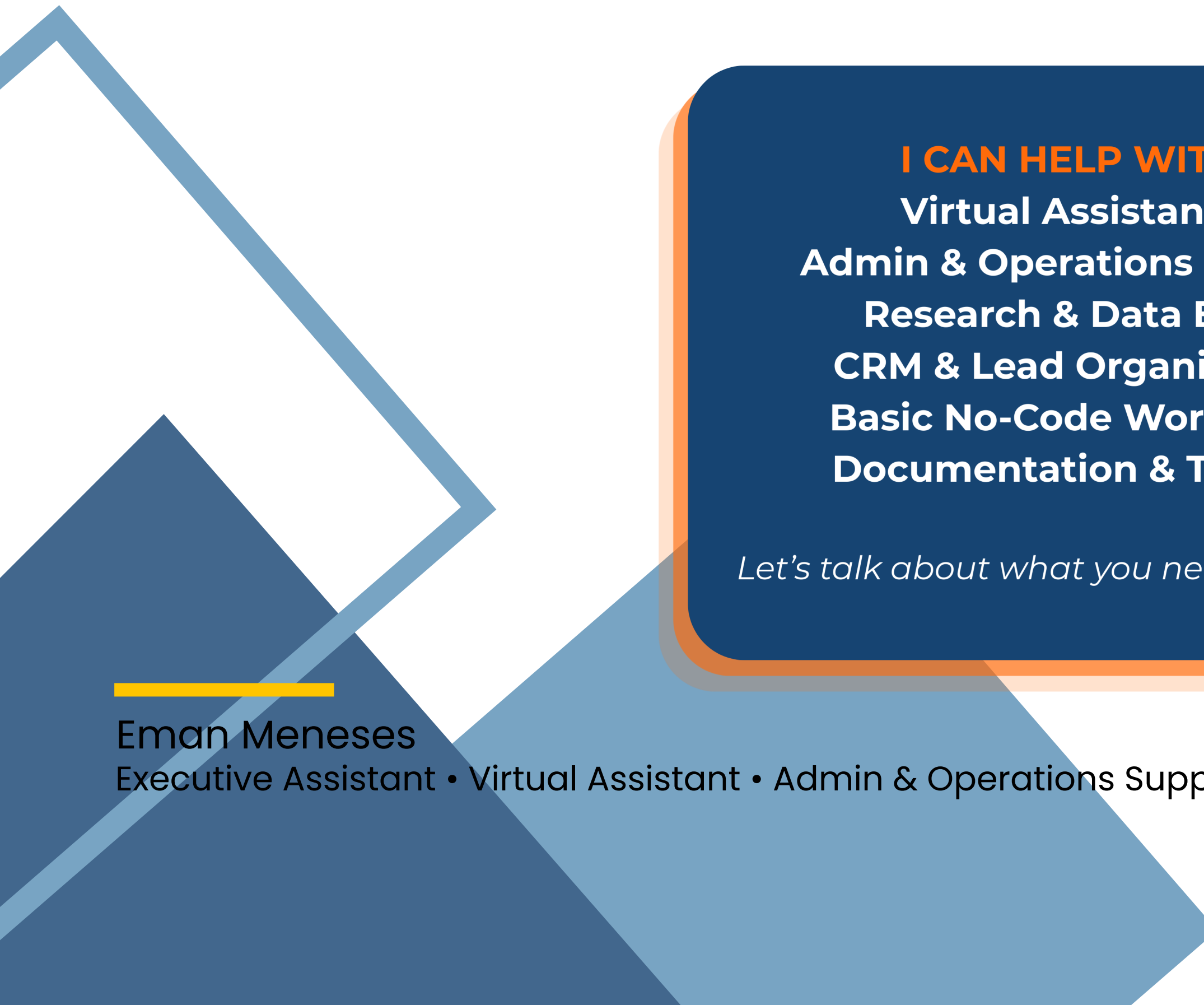
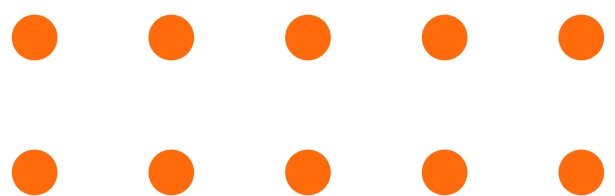
- Set up and organized assessment content
- Helped configure scoring and results
- Set up lead capture information
- Helped connect and test basic workflows
- Organized leads and CRM information
- Supported email follow-up setup
- Troubleshoot issues during testing
- Created documentation for handoff

What I Learned

This project taught me how to learn new tools, test workflows, troubleshoot issues, and document the process for handoff.

Tools I Worked With

ScoreApp
Zapier
MailerLite
SwipeOne
Google Sheets
Canva



Need help with a similar workflow?

I CAN HELP WITH:
Virtual Assistance
Admin & Operations Support
Research & Data Entry
CRM & Lead Organization
Basic No-Code Workflows
Documentation & Testing

Let's talk about what you need help with.



Eman Meneses
Executive Assistant • Virtual Assistant • Admin & Operations Support

