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LetsDoSales - Business Launch Kit

Prepared for: Aqib **Prepared by:** Adil **Date:** 4 October 2026

What's in this kit

#	Document	Use it for
00	Positioning	Website copy, and how you introduce the business in one sentence
01	Discovery Questionnaire	Run this on every call. It gets their numbers on the table
02	Offer & Pricing	What we sell and what we charge. Do not improvise on price
03	First 90 Days	Week-by-week plan, one niche, and the failure modes to avoid
04	Outreach Sequence	The three emails, and why email beats cold calls here
A	Workflow (Appendix)	The automation itself, already built and ready to demo

The one rule

Aqib sells. Adil builds. The scarce skill in this business is not automation - it is somebody who will get on the phone and ask a business owner for money. Everything in this kit assumes that split.

The niche, decided

Client document chasing for Canadian accounting and bookkeeping firms - firms of 2-15 staff with roughly 100-500 clients, where an owner-partner still prepares returns.

The wedge offer: Document Chase. We build each client's expected-document list, detect what is still missing, ask the client for the *specific* outstanding items, escalate to the partner when they go quiet, and keep a dated record of every chase.

Why this niche

- **The pain is the profession's own number-one complaint.** In a survey of 367 firm owners, "getting information and documents from clients" was the single biggest workflow challenge, cited by 65.2% - up from 53.8% the year before.
- **The economics are arithmetic,** not a pitch: firms report 5+ hours a week coordinating document requests, which is roughly \$1,500 a month of their most expensive time.

- **The buyer is reachable by email.** That matters because Aqib sells from Pakistan - a cold call from an overseas number pays a trust tax we cannot afford.
- **The competitors sell software the firm must operate.** We sell the chase actually being run. That is the whole difference.

What we are not

Not tax advice, not tax preparation, not practice-management software, and not document storage. **We track checklist status only - client tax documents never reach us.**

LetsDoSales — Positioning One-Pager

Niche: client document chasing for Canadian accounting & bookkeeping firms.

One-liner (use this everywhere): > We chase your clients' missing documents, so your preparers prepare returns.

The expanded version (website hero): > Your clients' documents arrive late, half-complete, or not at all — and the chasing > lands on your most expensive people. LetsDoSales runs the chase automatically: it knows > what each client still owes, asks them for the *specific* missing items, escalates to the > partner when they go quiet, and keeps a dated record of every touch.

Who we serve

- Canadian CPA and bookkeeping firms, 2-15 staff
- Roughly 100-500 active clients, with an owner-partner who still prepares returns
- First market: Calgary, Edmonton, Toronto — delivered remotely, so location does not matter
- Later: US firms on the IRS calendar. **Never mix the CRA and IRS calendars in one build.**

The problem we sell against

1. **This is the profession's own number-one workflow problem.** In a survey of 367 firm owners, "getting information and documents from clients" was the single biggest challenge, cited by **65.2%** — up from 53.8% the year before. Around **87%** of accounting professionals name client delays their leading workflow disruptor.
2. **The chase lands on the most expensive person** — the senior preparer or partner, because they are the ones who know what a complete file looks like. Firms report **5+ hours a week** just coordinating document requests.
3. **Every late document costs twice.** A return can't start until the file is complete, so each trickle-in means re-opening the file, re-reading where it stood, and re-deciding what's missing — then doing it again next week.
4. **It compresses the season.** Files that were workable in February all become "complete" in the final fortnight. Firms file extensions for clients who sent everything — just slowly.
5. **Chasing by email teaches clients to email sensitive documents.** The chase itself creates the data-handling risk.

What we install

Tier 1 — Document Chase (the wedge) Builds each client's expected-document list from last year's file, detects what is still missing, sends reminders that name the actual missing items (not "your documents"), escalates to the partner when a client goes quiet, and logs every touch with a date.

Tier 2 — Client Onboarding Chase New client comes in → engagement letter sent → document checklist issued → items collected and confirmed → file marked ready. Nothing reaches a preparer half-built.

Tier 3 — Deadline Command Centre Everything above plus every filing deadline across every client

on one calendar — T1, T2, T4/T5, GST/HST and instalments — with a live ready / not-ready view and an audit-ready export.

Where the proof comes from

We have no client case study yet — say so plainly. The proof at this stage is the measured industry data above, and the free Chasing Audit, which produces *their* number rather than ours. The moment client one has 60 days of data, replace this section with the before-and-after (see 01-discovery-questionnaire.md for exactly what to record).

Why us

- **We run the chase for you.** We are not another portal for your team to log into and configure. That is the entire difference between us and practice-management software.
- **You never hand us tax documents.** We track checklist *status* only; the documents stay in your own portal or drive.
- **One workflow, live in about a week.** No six-month transformation programme.

Call to action

“Book a free 20-minute Chasing Audit.” We count what chasing currently costs you per season, then show you what the same week looks like without it. No obligation.

What we are NOT (say this out loud, it builds trust)

- Not tax advice and not tax preparation — we never touch the return
- Not practice-management software (Karbon, TaxDome, Financial Cents) — those are tools *you* operate; we operate the chase for you
- Not a bookkeeping outsourcing service, and not document storage

Discovery Questionnaire — Accounting & Bookkeeping Firms

Goal of the call: leave with five numbers. Everything else is conversation.

#	The number	Where it comes from
1	Active clients	Q2
2	Documents per client per year	Q4
3	Hours per week spent chasing	Q5
4	Who does the chasing, and their rate	Q6
5	Extensions filed last season because documents were late	Q8

Those five numbers price the deal for you. Do not quote a price on this call unless asked — book the free Chasing Audit and price it afterwards.

Opening (30 seconds, say it plainly)

“We work with accounting firms on one specific thing: the chasing. Not the returns — the part where you’re emailing a client for the third time about one missing slip. I’ve got a few questions about how that works in your firm, and at the end I’ll tell you honestly whether we can help.”

Then stop talking. Let them talk.

The questions

Q1. How many people are in the firm, and how many prepare returns? *Why: owner-operators of 2–15 staff are our buyer. Bigger firms usually have an ops manager and a longer cycle — note it and move on.*

Q2. Roughly how many active clients do you handle? *Why: scales the engagement. Under about 80 clients the pain is real but the ROI won't carry \$800/month yet — that's a "later" list, not a no.*

Q3. Walk me through what happens when a client's documents come in. Where do they land? *Why: reveals the actual mess — a portal, an inbox, a shared drive, or all three. Listen for "scattered", "some by email", "it depends".*

Q4. On average, how many documents does one client owe you? *Why: the volume multiplier. 200 clients × 6 documents is 1,200 touchpoints a season — that number lands hard when you say it back to them.*

Q5. During busy season, how many hours a week does someone spend chasing missing documents? *Why: the single most important number. If they say "I don't know", say: "guess — two hours? Ten?" Most say four to eight. Write down exactly what they say.*

Q6. Who actually does that chasing? *Why: if it's the partner or the most senior preparer, the cost is highest and the pain is sharpest. That is our best buyer.*

Q7. How do you currently know what's still missing on a given file? *Why: if the answer is "a spreadsheet", that's the opening. If it's a portal, go to Q7b.*

Q7b. (If they name a portal) When the portal reminder doesn't work and the client still hasn't sent it, what happens next? *Why: the honest answer is almost always "then someone emails or calls them". **That somebody is what we replace.** The portal sends the reminder; we run the chase that follows. This is the difference between us and software they already own.*

Q8. Last season, how many returns did you extend where the client had actually sent everything you asked for — just late? *Why: the emotional question. It reframes the pain from "some admin" to "we filed extensions for people who did nothing wrong".*

Q9. When a client goes completely silent for two weeks, what do you do? *Why: reveals whether any escalation discipline exists, or whether it just sits there. Our product is* the escalation ladder.**

What NOT to say

- **Never give tax advice**, even if you know the answer. "That's your call — I only handle the chasing."
- **Never claim we have accounting clients already**. We don't yet. Say: "we're new to this niche, and that's exactly why the audit is free."
- **Don't quote prices on the discovery call**.
- Don't say "AI" more than once. Say "automated".

The close — the free Chasing Audit

"Here's what I'd like to do. Give me last season's client list and what each one owed you. In three days I'll send back a one-page count: how many document touchpoints you ran, how many stalled past the point work could start, and what those hours cost at your own rate. No charge, and you keep the page whether or not we work together."

Why this works: it's specific, it uses *their* data, it's verifiable, and it costs them nothing but a file export. It proves the product before they buy — and critically, **it can be delivered entirely by email**, so it doesn't depend on anyone picking up the phone.

Immediately after the call, record

Client count · documents per client · chasing hours/week · who chases · their hourly rate · extensions caused by lateness · current tracking method (portal / spreadsheet / nothing) · and one verbatim quote about the pain.

Offer & Pricing — LetsDoSales

Launch pricing (first 2 clients only — the discount buys proof)

\$500 setup + \$750/month, on a 60-day paid pilot. Not free. A free client doesn't cooperate, doesn't measure, and gives you nothing you can publish.

In exchange, the client agrees in writing to: - a written testimonial at day 60, - permission to publish the before/after numbers, and - two referral introductions to other firm owners.

Pilot clients move to standard pricing at day 61. Do not grandfather the pilot rate.

We have no accounting client yet. Until one exists, the pilot rate *is* the offer — don't apologise for it, and don't invent a case study.

Standard pricing

Tier 1 — Document Chase (the wedge) - **\$1,800 setup + \$800/month** · up to 150 clients · live in ~1 week - Builds each client's expected-document list, detects what's missing, sends reminders naming the specific outstanding items, escalates to the partner on silence, logs every touch.

Tier 2 — Onboarding + Chase - **\$3,200 setup + \$1,200/month** · up to 300 clients - Everything in Tier 1 plus new-client onboarding: engagement letter, checklist, collection confirmation, and a file marked ready before a preparer ever opens it.

Tier 3 — Deadline Command Centre - **\$5,500 setup + \$1,900/month** · unlimited clients, multi-partner - Everything above plus every filing deadline across every client on one calendar (T1, T2, T4/T5, GST/HST, instalments), live ready / not-ready status, and an audit-ready export.

Why \$800/month clears the bar

The arithmetic is the pitch. Firms report **5+ hours a week** coordinating document requests during season. At a loaded senior rate of roughly \$70/hour that is about **\$1,500 a month** of the most expensive time in the building — spent on chasing paper. \$800 is a little over half of one month's waste, and it lands on the line where the pain already is.

Market reference: small-business automation retainers run **\$500-\$3,500/month**, with setup fees of \$1,500-\$5,000. Accounting firms are price-sensitive, so Tier 1 deliberately sits at the low end of the retainer band with the setup fee carrying the effort.

Rules

1. **Annual commitment, monthly billing.** Month-to-month churn kills agencies.
2. **Setup fee is non-refundable and paid before the build starts.**
3. **Usage costs (SMS, email volume, AI usage) billed at cost + 15%.** Never absorb them.
4. **One workflow per tier.** Anything new is a change order — "that's a great idea, here's what it costs", never "sure, I'll add it".
5. **No performance guarantees.** Guarantee the system works, not their revenue.
6. **First month is the proof month.** If the agreed numbers don't move, we work free until they do.

The data boundary — put this in the SOW, and lead with it in conversation

We track checklist status only. Client tax documents stay in the firm's own portal or drive, and are never stored on our systems.

This is not a legal nicety, it's a sales weapon. It disarms the "are you PIPEDA-compliant?" objection before it's raised, it keeps the engagement inside Adil's own no-client-data rule, and it draws a clean line between us and a document-storage vendor.

What's explicitly excluded

- **Tax advice, tax treatment, filing positions** — we never touch the return
- Tax preparation or bookkeeping work of any kind
- Penalties, interest, or filing outcomes
- Their internal staff behaviour
- Third-party software licences (TaxDome, Karbon, Financial Cents, their portal)
- Document storage or archiving

The trap to watch for

Accounting firms will try to absorb us into delivery — "while you're in there, can you chase the *internal* review notes too?" That is bookkeeping work at automation prices. Every such request gets a price, or a no. We chase **clients**, not their staff.

First 90 Days — LetsDoSales

Niche: client document chasing for Canadian accounting & bookkeeping firms. One track, one niche. Do not add a second vertical until this one has a paying client.

The one change from the previous plan

We no longer have a warm launch client, and Aqib is calling from Pakistan. **So the motion is email-first, not cold calls.** A cold call from an overseas number pays a trust tax we can't afford to spend; a well-written email with a specific, verifiable artefact does not. Phone only enters the picture after someone replies.

Weeks 1-2 — Build the proof

- ☐ Rebuild the chase workflow on a realistic sample firm (120 clients, mixed fiscal year-ends, ~6 documents each). Live and runnable, not mocked.
- ☐ Record a 2-minute screen capture: a client's checklist showing four items missing, one reminder naming those items, then the escalation to the partner. **This video is the entire pitch.**
- ☐ Write the three-email outreach sequence (email 1 = their number, email 2 = the audit offer, email 3 = a single follow-up). No attachments on the first send.
- ☐ Build the 50-firm target list: Calgary, Edmonton, Toronto. Firm name, owner name, email, client-count estimate.
- ☐ Fix letsdosales.com: `www` resolving, HTTPS, WordPress hardened, `siteurl` off `http://`
- ☐ Publish the positioning one-pager (00) as the site copy
- ☐ Register the Canadian entity + business bank account (Adil)

Weeks 3-6 — First replies, first audits

- ☐ Aqib: **25 targeted emails/week.** Not 200 sprayed — 25 researched, named, specific.
- ☐ Deliver every **free Chasing Audit** requested. Target 8 delivered.
- ☐ Book discovery calls (01) only with firms that asked for the audit. Target 3/week.
- ☐ Aqib: 3 LinkedIn posts/week — one concrete chasing failure each time, never a pitch.
- ☐ Adil: warm intros in Calgary where he has them; otherwise stay out of the funnel.

The audit is the product demo. Five audits should produce one pilot. If it doesn't, the audit isn't

landing — fix the audit, not the volume.

Weeks 7-12 — Deliver, measure, raise

- ☐ Deliver the first pilot. Fill the *After* column from the discovery script.
- ☐ Publish one case study with real before/after numbers
- ☐ Move client 3+ to standard pricing
- ☐ Build Tier 2 only after Tier 1 has been delivered twice
- ☐ Referral programme: 10–20% of first-year revenue for introductions

The numbers to watch (review every Friday)

Metric	Week 12 target
Firms on the target list	50
Outreach emails sent	300
Replies	30
Chasing Audits delivered	8
Discovery calls held	15
Paid pilots signed	2
MRR	\$1,500+
Case studies published	1

Replies are the leading indicator. If replies are under 10% after 100 sends, the email is wrong. If replies are healthy but audits aren't converting, the audit is wrong. Fix the stage that's broken rather than pushing more volume into it.

Failure modes to avoid

1. **Building before selling.** Sell the audit, then build. Never the reverse.
2. **Cold-calling from Pakistan.** Email first. The phone is earned by a reply, not by dialling.
3. **Becoming a bookkeeping helper.** They will try. We chase clients; we never touch returns.
4. **Two niches at once.** Trades and property management are *later* verticals, not parallel ones. The market scan showed trades is already crowded and underpriced — leave it alone.
5. **Free work.** Pilot clients pay \$750/month from day one. Free clients don't measure.
6. **Scope creep.** Every “can you also...” gets a price, not a yes.
7. **Talking about AI.** Say “automated”. The buyer cares about their season, not models.
8. **Quoting the scary stats.** Use the credible, sourced numbers (65.2% cite document collection as their top workflow problem; 5+ hours a week). Never invent one.

Outreach Sequence - Email First

Three emails. If nobody replies, they were not a prospect.

Why email and not the phone: Aqib sells from Pakistan. A cold call from an overseas number pays a trust tax we cannot afford to spend on a stranger. An email carrying one specific, checkable number does not. The phone is earned by a reply, never by dialling.

The reality to plan around

Most firms do **not** publish an email — they hide behind a contact form, and some hide the owner's name entirely. So a send list needs three passes per firm, in this order:

1. **Published email** if there is one (verify it on their own site, never guess a pattern).
 2. **The contact form** on their site — paste the same body. Fine for email 1 and 2.
 3. **LinkedIn** — find the owner-partner by name and send email 1 as a connection note.
- Never invent an address. `info@` guesses bounce, and a bounce costs the domain's reputation.

Email 1 — the specific number (day 0)

Subject: chasing documents at {{firm}}

Hi {{first name}},

Quick question about {{firm}}'s busy season.

A survey of 367 firm owners found “getting information and documents from clients” was the single biggest workflow problem they had — 65.2% said so, up from 53.8% the year before. The firms I speak to usually put it at about five hours a week in season.

If you're running around {{client count}} clients, that's something like {{touchpoints}} document requests a season, and roughly \${{dollars}} a month of your most senior time.

We run that chase for firms automatically — we track what each client still owes you, ask them for the specific missing items by name, and escalate to you when they go quiet.

Worth 20 minutes? If it's not a fit, reply “audit” and I'll send you a free count of what chasing costs you instead.

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Rules for this email: - Under 150 words. It is a question, not a proposal. - **No attachments.** An unsolicited PDF on first contact reads as spam. - No prices. The audit is the next step, not the quote. - Fill in the three bracketed numbers, or delete the sentence. A wrong number is worse than none. - Never claim we have accounting clients. We don't yet. If asked, say so — “we're new to this niche, which is why the audit is free.”

Email 2 — the free Chasing Audit (day 3, only if no reply)

Subject: re: chasing documents at {{firm}}

Hi {{first name}},

Following up once. The offer stands: send me last season's client list and what each one owed you, and in three days I'll send back a one-page count — how many document touchpoints you ran, how many stalled past the point work could start, and what those hours cost at your own rate.

No charge, and you keep the page whether or not we work together.

Aqib

Email 3 — the close-out (day 7)

Subject: re: chasing documents at {{firm}}

Hi {{first name}},

Last note from me — I'll assume the timing isn't right and stop here. If the chasing gets heavy this season, the audit offer stays open.

Aqib

Why a close-out email matters: it is the highest-reply email in most sequences, because it removes the pressure. Do not skip it, and do not send a fourth.

Never do these

- **Never send two emails in one day.** It reads as desperation.
- **Never “just checking in”.** Every email carries something new or it doesn’t go.
- **Never quote the 87% or “5 hours” as our own finding.** They are other people’s surveys — cite them as such or don’t use them.
- **Never discuss tax treatment.** If they ask, “that’s your call, I only handle the chasing.”
- **Never mention AI.** Say automated.

Appendix - The Workflow

LDS - Client Document Chase (DEMO) - workflow id `mMofTT8gC0XVASds` on `https://n8n.adiljaved.cloud`

Already built, tested and imported. Switched off until a client signs.

In demo mode the Code node carries a sample firm roster. On a live client it is swapped for `Google Sheets: Get Rows` or the firm’s own portal API. We track checklist status only - document contents never reach us.

The chase ladder

Client has been quiet for	What happens
2-7 days	Friendly reminder naming the missing items
7-14 days	Firmer second ask
14-21 days	Escalated to the partner
Over 21 days	Critical - partner chases personally

Deadline override: a filing deadline inside 30 days bumps any file to *escalated*; inside 14 days it becomes *critical*, no matter how recently the client went quiet. A closing deadline outranks silence.

Verified sample output

Logic executed outside n8n against the demo roster:

Client	Tier	Action	Missing	Quiet	Days to deadline
M. Ferreira (personal)	CRITICAL	escalate	4	23	208
Northgate Plumbing Ltd	ESCALATE	escalate	3	17	20
Cedar & Vine Dental	CRITICAL	escalate	2	9	11
K. Osei (personal)	FIRM	chase	1	12	208
Hollis Design Co	REMIND	chase	1	4	45
Brightline Freight Inc	NONE	skip	0	0	120

Note Cedar & Vine: quiet only 9 days, which would normally be a gentle nudge - but its deadline is 11 days away, so the override escalates it. And Brightline, with every document in, is never chased at all.

The workflow JSON

```
{
  "name": "LDS - Client Document Chase (DEMO)",
  "nodes": [
    {
```

```

    "parameters": {
      "rule": {
        "interval": [
          {
            "field": "cronExpression",
            "expression": "0 7 * * *"
          }
        ]
      }
    },
    "id": "trigger-daily",
    "name": "Daily 7am",
    "type": "n8n-nodes-base.scheduleTrigger",
    "typeVersion": 1.2,
    "position": [
      -620,
      300
    ]
  },
  {
    "parameters": {
      "jsCode": "

```

```

// DEMO DATA - on a real client, swap this node for 'Google Sheets:
Rows' or the\n// firm's portal API. Expected columns: client, email, filing,
fiscal_year_end,\n// received, missing[], days_waiting, chases.\n// NOTE: we track
checklist STATUS only. Document contents never reach us.\nconst base = new
Date();\nbase.setHours(0, 0, 0, 0);\nconst DAY = 86400000;\n\n// T2 deadlines are 6 months
after fiscal year end, so derive the year end from the\n// deadline we want to demonstrate.
T1 is April 30 after a Dec 31 year end.\nfunction fyeForT2DeadlineIn(days) {\n  const dl =
new Date(base.getTime() + days * DAY);\n  const y = new Date(dl.getFullYear(),
dl.getMonth() - 6, dl.getDate());\n  return y.toISOString().slice(0, 10);\n}\n\nconst
PERSONAL_FYE = base.getFullYear() + '-12-31';\n\nconst clients = $json.clients || [\n  {\n
client: 'M. Ferreira (personal)', email: 'mferreira@example.com', filing: 'T1',\n
fiscal_year_end: PERSONAL_FYE, received: 2,\n  missing: ['T3 trust slip', 'RRSP
contribution receipt', 'Childcare receipts', 'Medical receipts'],\n
  days_waiting: 23,
chases: 3 },\n  {\n client: 'Northgate Plumbing Ltd', email: 'books@northgate.example',
filing: 'T2',\n
fiscal_year_end: fyeForT2DeadlineIn(20), received: 3,\n
missing: ['Q4 bank statement', 'T4 summary', 'Shareholder loan note'],\n
days_waiting: 17, chases: 2
},\n  {\n client: 'Cedar & Vine Dental', email: 'accounts@cedarvine.example', filing: 'T2',\n
fiscal_year_end: fyeForT2DeadlineIn(11), received: 4,\n
missing: ['Equipment lease agreement', 'Payroll register'],\n
days_waiting: 9, chases: 1 },\n  {\n client: 'K. Osei
(personal)', email: 'kosei@example.com', filing: 'T1',\n
fiscal_year_end: PERSONAL_FYE,
received: 4, missing: ['Tuition slip T2202'],\n
days_waiting: 12, chases: 2 },\n  {\n client: 'Hollis Design Co', email: 'hello@hollisdesign.example', filing: 'T2',\n
fiscal_year_end: fyeForT2DeadlineIn(45), received: 5, missing: ['Travel expense
receipts'],\n
days_waiting: 4, chases: 1 },\n  {\n client: 'Brightline Freight Inc',
email: 'ap@brightline.example', filing: 'T2',\n
fiscal_year_end:
fyeForT2DeadlineIn(120), received: 7, missing: [], days_waiting: 0, chases: 0 }\n];\n\n//
Filing deadlines: T2 = 6 months after fiscal year end, T1 = April 30 following year
end.\n// This encodes the calendar ONLY - it is never tax advice.\nfunction
deadlineFor(filing, fye) {\n  const d = new Date(fye + 'T00:00:00');\n  if (filing ===
'T2') {\n    return new Date(d.getFullYear(), d.getMonth() + 6, d.getDate());\n  }\n
return new Date(d.getFullYear() + 1, 3, 30);\n}\n\nconst today = new
Date();\ntoday.setHours(0, 0, 0, 0);\n\nreturn clients.map(c => {\n  const dl =
deadlineFor(c.filing, c.fiscal_year_end);\n  const days_to_deadline = Math.round((dl -
today) / DAY);\n  const missing = c.missing || [];\n\n  // Chase ladder, driven by how long
the client has been quiet.\n  let tier = 'NONE';\n  if (missing.length > 0) {\n    if
(c.days_waiting > 21) tier = 'CRITICAL';\n    else if (c.days_waiting > 14) tier =
'ESCALATE';\n    else if (c.days_waiting > 7) tier = 'FIRM';\n    else if (c.days_waiting >
2) tier = 'REMIND';\n  }\n\n  // A closing deadline outranks silence: bump the tier even if
they went quiet yesterday.\n  if (missing.length > 0) {\n    if (days_to_deadline <= 14)
tier = 'CRITICAL';\n    else if (days_to_deadline <= 30 && tier !== 'CRITICAL') tier =
'ESCALATE';\n  }\n\n  const action = (tier === 'NONE') ? 'skip'\n    : (tier ===
'REMIND' || tier === 'FIRM') ? 'chase'\n    : 'escalate';\n\n  return { ...c,

```

```
missing, missing_count: missing.length, deadline: dl.toISOString().slice(0, 10),\n  days_to_deadline, tier, action };\n});"
```

```
},
{"id": "chase-logic",
"name": "Missing items + chase tier",
"type": "n8n-nodes-base.code",
"typeVersion": 2,
"position": [
  -400,
  300
]
},
{
  "parameters": {
    "conditions": {
      "options": {
        "caseSensitive": true,
        "leftValue": "",
        "typeValidation": "strict"
      },
      "conditions": [
        {
          "id": "c1",
          "leftValue": "={{ $json.action }}",
          "rightValue": "chase",
          "operator": {
            "type": "string",
            "operation": "equals"
          }
        }
      ],
      "combinator": "and"
    },
    "options": {}
  },
  "id": "is-chase",
  "name": "Chase the client?",
  "type": "n8n-nodes-base.if",
  "typeVersion": 2,
  "position": [
    -180,
    220
  ]
},
{
  "parameters": {
    "conditions": {
      "options": {
        "caseSensitive": true,
        "leftValue": "",
        "typeValidation": "strict"
      },
      "conditions": [
        {
          "id": "c2",
          "leftValue": "={{ $json.action }}",
          "rightValue": "escalate",
          "operator": {
            "type": "string",
            "operation": "equals"
          }
        }
      ],

```

```

        "combinator": "and"
    },
    "options": {}
},
{id": "is-escalate",
"name": "Escalate to partner?",
"type": "n8n-nodes-base.if",
"typeVersion": 2,
"position": [
    -180,
    460
]
},
{
    "parameters": {
        "assignments": {
            "assignments": [
                {
                    "id": "s1",
                    "name": "subject",
                    "value": "=Still need {{ $json.missing_count }} item(s) for your {{
$json.filing }} - deadline {{ $json.deadline }}",
                    "type": "string"
                },
                {
                    "id": "s2",
                    "name": "body",
                    "value": "=Hi {{ $json.client }},\n\nWe're still waiting on {{
$json.missing_count }} item(s) so we can start your {{ $json.filing }} return:\n\n{{
$json.missing.map(i => '  \u2022 ' + i).join('\n') }}\n\nYour filing deadline is {{
$json.deadline }} ({{ $json.days_to_deadline }} days away).\n\nReply to this email with the
files, or just tell us the date you'll send them and we'll book the time.\n\nThank you",
                    "type": "string"
                }
            ]
        },
        "options": {}
    },
    "id": "build-chase",
    "name": "Build chase (names the items)",
    "type": "n8n-nodes-base.set",
    "typeVersion": 3.4,
    "position": [
        60,
        200
    ]
},
{
    "parameters": {
        "sendTo": "={{ $json.email }}",
        "subject": "={{ $json.subject }}",
        "message": "={{ $json.body }}",
        "options": {}
    },
    "id": "send-chase",
    "name": "Send chase to client",
    "type": "n8n-nodes-base.gmail",
    "typeVersion": 2.1,
    "position": [
        300,
        200
    ],
    "notes": "Swap for the firm's own portal/SMTP so replies land in their system"
}

```

```

    },
    {
      "parameters": {
        "aggregate": "aggregateAllItemData",
        "options": {}
      },
      "id": "collect-stalled",
      "name": "Collect stalled files",
      "type": "n8n-nodes-base.aggregate",
      "typeVersion": 1,
      "position": [
        60,
        460
      ]
    },
    {
      {
        "parameters": {
          "sendTo": "={{ $env.PARTNER_EMAIL || 'partner@example.com' }}",
          "subject": "={{ $json.data.length }} client file(s) stalled - partner action
needed",
          "message": "=These clients have gone quiet and are now your problem, not the c
queue's:\n\n{{ $json.data.map(c => '- ' + c.client + ': ' + c.missing_count + ' item(s)
missing, ' + c.days_waiting + ' days quiet, ' + c.tier + ' (deadline ' + c.deadline + ', '
+ c.days_to_deadline + ' days away)').join('\n') }}\n\nThey have each been emailed at
least once.",
          "options": {}
        },
        "id": "send-partner",
        "name": "Escalate to partner",
        "type": "n8n-nodes-base.gmail",
        "typeVersion": 2.1,
        "position": [
          300,
          460
        ]
      },
      {
        "parameters": {},
        "id": "noop",
        "name": "Nothing due today",
        "type": "n8n-nodes-base.noOp",
        "typeVersion": 1,
        "position": [
          60,
          660
        ]
      }
    },
    {
      {
        "parameters": {
          "content": "",
          "height": 300,
          "width": 500,
          "color": 4
        },
        "id": "note",
        "name": "DEMO NOTES",
        "type": "n8n-nodes-base.stickyNote",
        "typeVersion": 1,
        "position": [
          -720,
          40
        ]
      },
      "notes": "CLIENT DOCUMENT CHASE (Tier 1)\n\nDEMO MODE: the Code node holds a sam

```

firm roster. Swap it for 'Google Sheets: Get Rows' or the firm's portal API.\n\nChase ladder: quiet >2d = REMIND, >7d = FIRM, >14d = ESCALATE, >21d = CRITICAL.\nDeadline override: within 30 days of the filing deadline bumps to ESCALATE; within 14 days to CRITICAL.\n\nThe email NAMES the specific missing items instead of saying 'your documents' - that is the whole difference from a portal reminder.\n\nWe track checklist status only; document contents never reach us."

```
    }
  ],
  "connections": {
    "Daily 7am": {
      "main": [
        [
          {
            "node": "Missing items + chase tier",
            "type": "main",
            "index": 0
          }
        ]
      ]
    },
    "Missing items + chase tier": {
      "main": [
        [
          {
            "node": "Chase the client?",
            "type": "main",
            "index": 0
          }
        ]
      ]
    },
    "Chase the client?": {
      "main": [
        [
          {
            "node": "Build chase (names the items)",
            "type": "main",
            "index": 0
          }
        ],
        [
          {
            "node": "Escalate to partner?",
            "type": "main",
            "index": 0
          }
        ]
      ]
    },
    "Build chase (names the items)": {
      "main": [
        [
          {
            "node": "Send chase to client",
            "type": "main",
            "index": 0
          }
        ]
      ]
    },
    "Escalate to partner?": {
      "main": [
        [
```

```
        {
          "node": "Collect stalled files",
          "type": "main",
          "index": 0
        }
      ],
      [
        {
          "node": "Nothing due today",
          "type": "main",
          "index": 0
        }
      ]
    ],
    "Collect stalled files": {
      "main": [
        [
          {
            "node": "Escalate to partner",
            "type": "main",
            "index": 0
          }
        ]
      ]
    }
  },
  "settings": {
    "executionOrder": "v1"
  }
}
```