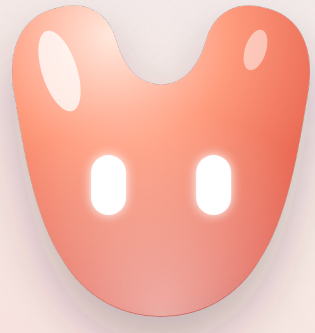
Orpheus

AI operations for ecommerce agencies

For email and retention agencies with 10 to 50 people

Every workflow, in one list. *Pick the ones you want.*

32 email agency jobs an AI system already runs in our own agency. What each one replaces, what the system does, and what your team still decides.



Workflow catalog · October 2026

HOW TO USE THIS CATALOG

You don't need to know what to build. *Tick what hurts.*

Most agency owners only know what they want once they see the options. Read the list, tick the jobs that eat your team's week, and bring the numbers to the diagnostic.

STEP 1

Skim the list

Each workflow has a number. The next page shows all 32 by part of the week, then each one gets a card.

STEP 2

Tick three to five

Pick the jobs that cost your team the most hours or cause the most client complaints. You don't need to rank them.

STEP 3

Bring the numbers

Send them before your AI Ops Diagnostic. We measure each one in your agency and tell you which to build first.

Every workflow here runs in our own email and retention agency today. What it saves in yours is measured against your own baseline in the diagnostic.

THE FULL LIST

32 workflows *across the whole week.*

CLIENT OPS

01 Start-of-day list
02 Client channel watch
03 Call notes and meeting prep
04 Client log and weekly summary
05 Client channel guard

STRATEGY AND BRIEFS

06 Your playbooks on every account
07 Flow and campaign briefs
08 Email copy options
09 Roadmaps and test plans
10 Feedback and change sync
11 Copy edits from Slack
12 Offer, promo and journey audits
13 Flow overlap check

BUILD

14 Campaign shells, segments and build tasks

QA

15 QA at three points
16 Your standards, enforced on save
17 Copy checks before design
18 Design QA against copy and feedback
19 Specialist review teams
20 Nightly account check
21 Saved client rules
22 Store and knowledge drift check
23 Incident log that fills itself in

REPORTING

24 Monthly client reports
25 Deeper analysis and forecasts

AGENCY OPS

26 Team scorecard and usage report
27 Training on your methods
28 Billing checks

GROWTH AND SALES

29 New client research and setup
30 Prospect audit and pitch deck
31 Close-won handoff and contracts
32 Founder content from real work

01 CLIENT OPS

Start-of-day list

Today. Each strategist, coordinator and designer opens ClickUp, Slack, Gmail, Figma and the client docs every morning to work out what's waiting.

With the system. One command sorts every client's messages, mentions, due dates, QA items and unanswered Figma threads into one list, most urgent first, with a suggested first move.

Your team decides. What gets done first. The list is a starting point to challenge, not an order.

Good first pick because every person uses it every day.

02 CLIENT OPS

Client channel watch

Today. Account leads re-read busy client channels to find the question nobody answered, and hear about a broken send when the client does.

With the system. Scheduled checks list every client message still waiting on a reply, alert the right person to signs of a live problem (they mark it urgent or dismiss it right in the alert channel), turn requests that never became tasks into tasks, send files clients share to the design team, and find new comments on docs, sheets and Figma files.

Your team decides. What to do with each item.

Best with a reply-time standard, such as 6 business hours.

03 CLIENT OPS

Call notes and meeting prep

Today. Call notes sit in someone's notebook. Agendas get built by hand from Slack, the board and the latest numbers.

With the system. Call notes filed to each client's tracker and checked before they land. A draft agenda deck built from recent messages, open tasks and performance data.

Your team decides. The agenda and anything promised to the client.

Useful when client history lives in one person's head.

04 CLIENT OPS

Client log and weekly summary

Today. An account lead reads a week of Slack and ClickUp to remember where each client stands.

With the system. Each weekday, client activity from Slack and ClickUp lands in that client's log, and the changes that matter are written into their strategy tracker. Every Sunday, a short digest for each client.

Your team decides. What to raise with the client and what to change in the plan.

Lets you see every account without reading every channel.

05 CLIENT OPS

Client channel guard

Today. An internal note, an API key or a half-finished message slips into a client's channel.

With the system. Every post to a client Slack channel or ClickUp task is checked first for internal references, exposed keys, house-style breaks and length limits.

Your team decides. What gets posted. The check flags it and a person fixes it.

Small setup that protects every client relationship.

06 STRATEGY AND BRIEFS

Your playbooks on every account

Today. Juniors wait for a senior strategist to answer, or fall back on generic advice.

With the system. Your retention playbooks and client learnings built into the system. Anyone can ask a strategy question and get an answer that cites the playbook it came from. Tactics and vendor help docs are refreshed every month.

Your team decides. Whether the advice fits the client. Seniors own the playbooks.

Foundation that makes every other workflow better.

☐ 07 STRATEGY AND BRIEFS

Flow and campaign briefs

Today. Your best strategist writes every brief, or juniors write weaker ones that come back for rework.

With the system. A first-draft brief in your template from the client's knowledge base, this month's roadmap and your playbooks. It lists what the client still needs to confirm, and a review check runs before anyone reads it.

Your team decides. The final brief. A strategist edits instead of starting from blank.

Biggest lever when brief quality depends on who wrote it.

☐ 08 STRATEGY AND BRIEFS

Email copy options

Today. A copywriter or strategist writes each email from scratch, then waits on edits.

With the system. Several options for each subject line, preview and body section, written in the client's voice. It learns each client's taste from the copy they approved before, and flags saved copy examples that have gone stale.

Your team decides. Which option ships, and every edit before the client sees it.

Measure it by review time per email.

☐ 09 STRATEGY AND BRIEFS

Roadmaps and test plans

Today. Someone formats each client's monthly roadmap sheet by hand and plans tests when there's time.

With the system. A roadmap sheet built for each client each month, plus a 12-week test plan drafted from what has and hasn't been tested.

Your team decides. What goes on the plan and what the client is asked to approve.

Good add-on once briefs are running.

☐ 10 STRATEGY AND BRIEFS

Feedback and change sync

Today. A client comments on the doc, the brief changes, and the designer never hears about it.

With the system. Client comments pulled back into the source brief, redlined and answered. When a brief or copy changes, the system lists every doc, task and design it touches and tells the right person. After a send date or audience change, it makes sure the project board, email platform, roadmap, Figma and copy all get updated.

Your team decides. Which feedback to accept and how to reply.

Fixes the handoff gap between strategy, copy and design.

☐ 11 STRATEGY AND BRIEFS

Copy edits from Slack

Today. A designer or account lead needs one line changed, asks a writer, waits, then someone re-syncs the doc.

With the system. An agent in Slack takes the wording change, makes it in the copy, and keeps the published doc in sync.

Your team decides. Whether the change is right. Big copy changes still go through the strategist.

Small job that removes a lot of waiting.

☐ 12 STRATEGY AND BRIEFS

Offer, promo and journey audits

Today. Checking a client's offers, promotions, merchandising and customer journey takes a strategist hours, so it rarely happens. Discount codes get checked by hand.

With the system. Audits of the offer, promo calendar, merchandising, subscription offer and full customer journey, plus every live discount code checked against the client's approved offers.

Your team decides. Which findings go to the client and what to change first.

Turns into strategy work you can bill for.

☐ 13 STRATEGY AND BRIEFS

Flow overlap check

Today. A new flow gets briefed without anyone checking what the client already has live, and customers get two emails for the same reason.

With the system. Each client's live flows and journey map rebuilt from the email platform every week. A new flow brief is blocked until it has been checked against them for overlap.

Your team decides. Whether the new flow replaces, joins or skips the existing one.

Catches double-mailing before it gets built.

☐ 14 BUILD

Campaign shells, segments and build tasks

Today. Specialists set up audience, send time, sender and naming by hand, rebuild the same segments for each client, and clone tasks every month.

With the system. Campaign shells set up from the brief, standard segments built in the email platform, and each month's build tasks created with their subtasks. A cleanup tool tidies campaign tags.

Your team decides. The design and the final build. Nothing gets scheduled or sent without a person.

Best with consistent naming across clients.

☐ 15 QA

QA at three points

Today. QA checks the build against the brief and stops there. If the brief was wrong, so is the send.

With the system. A structure check on every brief before anyone reads it, a pre-launch check that tests every audience path through a flow, and a live check of what each flow actually sent in the last 30 days.

Your team decides. The final sign-off, and what to do about anything flagged.

Catches the misroute the client would otherwise find.

☐ 16 QA

Your standards, enforced on save

Today. The brief standard lives in a doc that new hires skim once.

With the system. A brief can't be saved until the brief standard, the right playbook and the matching flow template have been read, and it fails if it breaks the format. The client-facing version can't be made until both QA checks pass. Email platform and Sheet rules work the same way.

Your team decides. What the standards say. Seniors own them.

Makes your process the default, not a suggestion.

☐ 17 QA

Copy checks before design

Today. Refreshed copy drifts from what the brief asked for, and an old subject line gets sent again.

With the system. Copy checked that it only changes what the brief asks for and reads clearly before design handoff. Campaigns and resends blocked if they reuse an old subject line or preview text. Misnamed copy files caught.

Your team decides. Final copy and any exception.

Cuts rework between copy and design.

☐ 18 QA

Design QA against copy and feedback

Today. A reviewer compares each design with its copy line by line.

With the system. Each design compared with its approved copy and the client's past design feedback, with a visual diff between versions.

Your team decides. Sign-off on the design. Taste stays with your designers.

Best with clients who give detailed design feedback.

☐ 19 QA

Specialist review teams

Today. A senior person spends hours checking a build spec, a segment or a report, and still misses things.

With the system. Six built-in reviews, each run by a team of AI reviewers: build specs, overlapping customer journeys, segment logic, the data tables in a brief, the root causes of churn, and a three-round audit of every report.

Your team decides. What to fix. The reviewers flag issues and your team makes the call.

Gives every strategist a senior-level second check.

☐ 20 QA

Nightly account check

Today. Broken integrations, stopped flows and expired discount codes get found by hand, often after the client notices.

With the system. Every client account checked each night for integration problems, flows that stopped sending, broken codes and over-mailing. It only posts what changed.

Your team decides. What to fix first and what to tell the client.

Runs in the background once it's set up.

☐ 21 QA

Saved client rules

Today. The client catches a mistake and says "we've already told you this." Then it happens again next month.

With the system. Every miss and every client correction becomes a proposed rule. Design comments in Figma work the same way. Feedback a client keeps repeating is promoted to a standing rule each week, and new QA lessons arrive in a daily digest. Each approved rule is checked on every brief and QA run after that.

Your team decides. Which rules to keep. A person approves every one.

Fewer repeat mistakes is the thing to measure.

☐ 22 QA

Store and knowledge drift check

Today. A price or product changes on the store and the email still shows the old one. Client knowledge files go stale and nobody notices.

With the system. Every day, each Shopify client's prices, SKUs and stock are refreshed and changes flagged. Every week, stale client knowledge files are flagged for an update.

Your team decides. What to update and whether a scheduled send needs a fix.

Prevents the wrong-price email.

☐ 23 QA

Incident log that fills itself in

Today. Mistakes get fixed in Slack and never written down, so nobody can see patterns. Most incident logs die out within a quarter.

With the system. A one-minute incident form with AI filling in the details, plus a scan twice a week that finds incidents in client channels that nobody logged.

Your team decides. The root cause and the fix. Patterns feed the saved client rules.

Gives you a real record of what goes wrong and why.

☐ 24 REPORTING

Monthly client reports

Today. Strategists export from the email, SMS and subscription platforms and the store, paste into a template, and write commentary. A copied cell can make a number wrong.

With the system. Each client's data pulled into one place on the same day each month. Fixed calculations do the math, one model drafts the commentary, a second checks it against the numbers, and the report renders as a branded PDF or web page.

Your team decides. The story. A strategist reviews every report before it goes out.

Frees time for deeper analysis clients pay more for.

☐ 25 REPORTING

Deeper analysis and forecasts

Today. Subscription, cohort and flow analysis takes hours per client, so it gets skipped in busy months.

With the system. Subscription reports and cancellation reasons, engaged-subscriber and cohort analysis, a full flow inventory, journey maps, sale forecasts and live holdout tests that split new subscribers into test and control groups. When a number is disputed, several models answer the same question and their answers are compared.

Your team decides. What the analysis means and what to recommend to the client.

This is the deeper work clients pay more for.

☐ 26 AGENCY OPS

Team scorecard and usage report

Today. Someone spends Monday checking response times, open comments and board hygiene, then rebuilds it all for the month.

With the system. Weekly and monthly checks on reply times, unanswered comments, revision rounds and roadmap accuracy, plus a report on who uses which commands.

Your team decides. Who needs help or training, and what the targets are.

Makes adoption part of each person's KPIs.

☐ 27 AGENCY OPS

Training on your methods

Today. New hires learn by shadowing a senior person, and the training stops when that person gets busy.

With the system. A command that teaches your methods and playbooks on demand, then quizzes the person on them.

Your team decides. What good looks like. Seniors own the methods it teaches.

Shortens the time before a new hire works at a senior level.

☐ 28 AGENCY OPS

Billing checks

Today. Before an invoice goes out, someone checks by hand what actually shipped this month.

With the system. A snapshot of what shipped, from the email platform and ClickUp, built before each invoice is due. New client subscriptions moved to their contracted first billing date.

Your team decides. The invoice and any credit or extra charge.

Stops billing surprises in either direction.

☐ 29 GROWTH AND SALES

New client research and setup

Today. A strategist spends days reading the new client's site, reviews and forums, and a coordinator sets up folders and trackers from memory.

With the system. A set of research prompts run over the client's site, reviews and forums to build their knowledge base. Folders, tracker and client lists set up in every system at once.

Your team decides. Which findings are right. The account lead approves client facts.

Gets new clients to useful work sooner.

☐ 30 GROWTH AND SALES

Prospect audit and pitch deck

Today. An audit-led pitch takes hours of senior time, so it only happens for the biggest prospects.

With the system. An automated audit of the prospect's retention program, turned into a draft pitch deck.

Your team decides. The findings you stand behind, the offer and the price.

Lets you pitch every good-fit prospect with an audit.

☐ 31 GROWTH AND SALES

Close-won handoff and contracts

Today. A signed deal gets handed over in a call, and the owner fills in contract templates by hand.

With the system. A close-won document and kickoff deck built from the sales conversation, plus a contract draft and payment link. Nothing is sent on its own.

Your team decides. The terms, the price and when the contract goes out.

Means the delivery team starts with everything sales learned.

☐ 32 GROWTH AND SALES

Founder content from real work

Today. The owner's posts and newsletter slip because client work always comes first.

With the system. Work sessions turned into post drafts, trend scans for timely topics, video ideas and scripts, and a weekly newsletter drafted in the owner's voice.

Your team decides. What gets published. The owner approves every post.

Best for agencies whose founder is part of the pitch.

YOUR SHORTLIST

The numbers you ticked

Write down the three to five that would help most, then send them when you book your AI Ops Diagnostic.

Book at orpheus.agency/book.html

WHERE TO START

Pick the job that hurts most. *Start with one.*

IF THIS SOUNDS LIKE YOUR TEAM	START WITH	A SMALL FIRST PILOT
Mornings go to checking every tool	Start-of-day list	One pod for two weeks, each person challenging the list against their own sweep.
Client messages slip through	Client channel watch	Three clients' channels and a reply-time standard your leads agree on.
Briefs and copy wait on senior people	Briefs and copy options	One client's next month, side by side with your senior strategist's own.
Clients repeat the same feedback	Saved client rules	One client's past feedback turned into rules, then every new brief checked.
Monthly reports eat the first week	Monthly client reports	One client's last month, checked line by line against the report you sent.
New clients take weeks to ramp up	New client research	Your next signed client, checked by the account lead before kickoff.
Pitches take too long to prepare	Prospect audit and deck	Your next two good-fit prospects, every finding checked before the call.

HOW WE'D START

One workflow first. *Measured against today.*

STEP 1

AI Ops Diagnostic

We map where your strategists' and coordinators' hours go and which jobs repeat across clients. You keep the scorecard and plan whether or not you hire us.

STEP 2

Pick and baseline

Choose the workflow with the clearest payoff. Record how long it takes today and what good looks like.

STEP 3

Build and test

Set it up in your tools and run it on real client work, with your team reviewing every output.

STEP 4

Expand and reprice

Add the next workflows, train the team, and rebuild one service line so the freed time is sold as bigger work.

Book an AI Ops Diagnostic →

orpheus.agency/book.html