



Run Your Client Communications on **Autopilot.**

Service industry
professionals
spend up to 30%
of their time on
administrative tasks.



Costing your
business up to
£37,572* in lost
opportunities.

*Avg. UK Sales Rep salary- Glassdoor



ProjectPilot is a bespoke, email-first **communication system** that plugs into your existing CRM and handles the client touch points your team forgets or delays.



Without ProjectPilot...



Productivity

8-12/pw
hours wasted

emailing clients &
chasing project
updates.

Cashflow

**Missed
Opportunities**

due to staff being
overloaded with
repetitive admin.

Opportunities

**Lost
clients**

caused by
inconsistent & slow
communications.

Compliance

**Increased
Risk**

from poorly
delivered reports
& project updates.

With ProjectPilot...



Up to 25% Faster Project Delivery



Faster Payment Collections

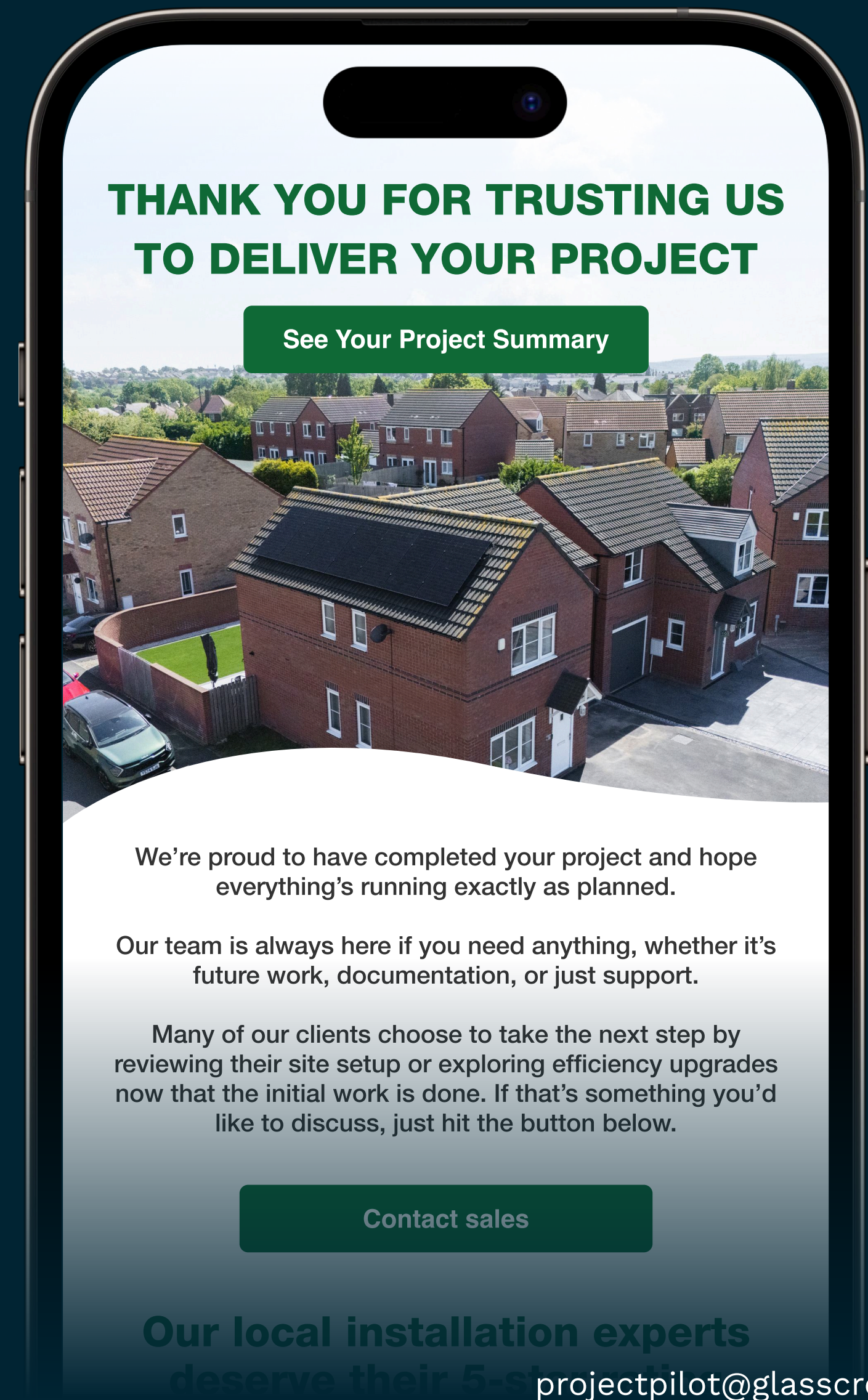


Consistent Client Communication



Zero Additional Training Required

A Glass Creative Project.



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ProjectPilot is great for...



Contractors & Trades



Installers & Engineers



Manufacturing & Logistics



Training Providers



Facilities & Property Management



Professional Services



Financial Services



Events & Hospitality

“The infrastructure
that Mike has built
works **flawlessly**”.

(Sam, Director of EcoSheffield)



How ProjectPilot works



Connect

1

We integrate with your existing CRM or project tracking tool (E.G. Monday.com, Salesforce, Hubspot, etc.)

Consult

2

We sit down with you to completely understand your sales process. Every workflow is custom built for your needs.

Build

3

We design & build your automations for you. All sends feature your branding, and are built mobile-first.

Automate

4

Emails send automatically based on project data or key timeline triggers. No extra input is needed from you.

Optimise

5

We track all send performance over time and adjust content for maximum impact with your unique audience.

Real World Use Cases



Client Onboarding

Welcome emails with project contact information, what to expect, form links, and branded documentation.



Weekly Progress Reports

Project updates emailed automatically to clients every Friday, summarising activity and planned works for the following week.



Project Milestone Updates

Automatically notifies clients and internal teams when key stages like “foundations laid” or “roof complete” are hit.



Handover & Compliance

Trigger email sequences when projects are signed off, with information including certificates, manuals, and warranty docs.

Almost 60% of UK
general contractors
feel like they **can't get**
a full picture of their
project timeline.

(PlanRadar, 2023)



Flexible Plans



Starter Plan

Ideal for start-ups who need to boost conversion without hiring a full-time employee.

(1–5 Active Projects at any one time)

- ✓ Automated lead follow-up & quote chasers
- ✓ Basic project updates (status-based)
- ✓ Payment reminder sequences
- ✓ Optional marketing email newsletter support (priced individually)
- ✓ Estimated savings: ~£3,000+/month*
- ✓ Annual ROI: 10x–12x typical investment*

[Make an enquiry](#)

Professional Plan

Ideal for growing businesses who need a complete client lifecycle system without expanding the sales team.

(6–10 Active Projects at any one time)

- ✓ Advanced project milestone notifications (multi-stage updates)
- ✓ Automated client onboarding sequences (welcome, FAQs, key contacts)
- ✓ Handover & compliance automations
- ✓ Monthly performance reporting & optimisation
- ✓ Estimated savings: ~£7,000+/month*
- ✓ Annual ROI: 10x–15x typical investment*

[Make an enquiry](#)

Enterprise Plan

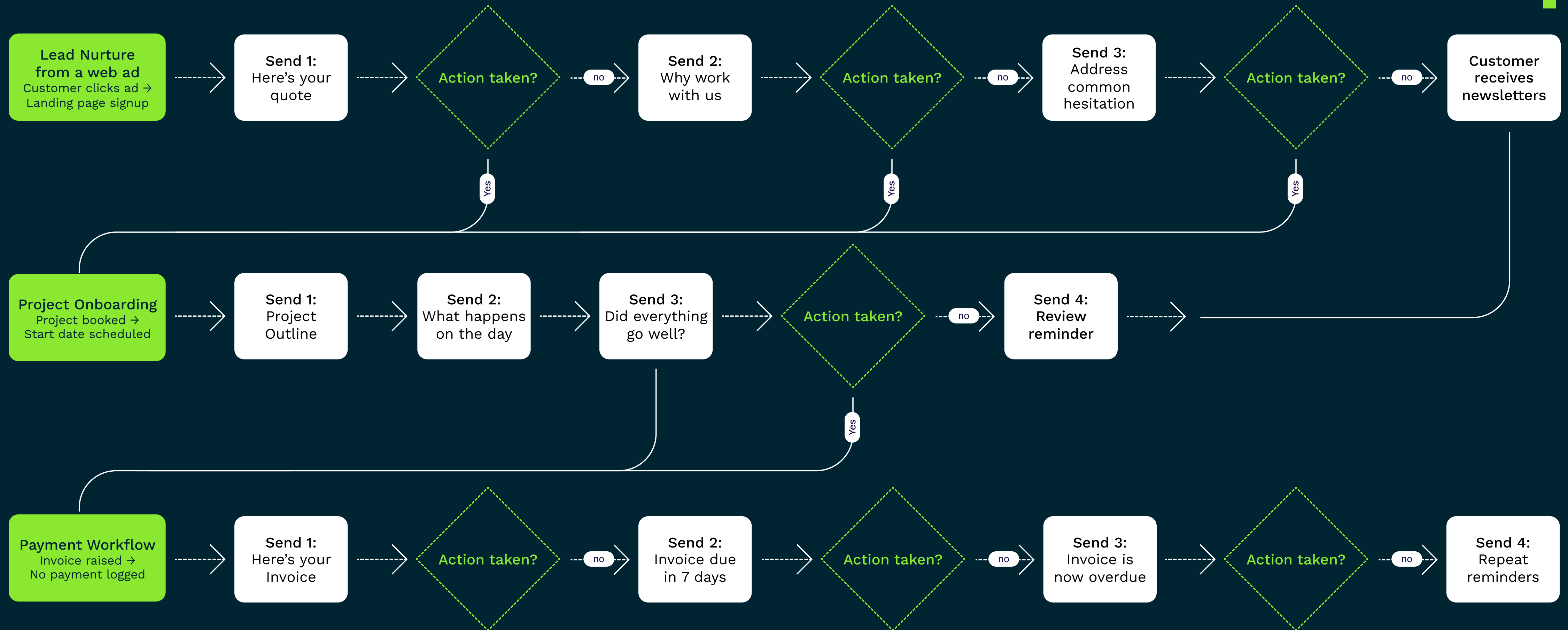
Ideal for established companies who need fully customised systems across multiple teams and projects.

(10+ Active Projects at any one time)





- ✓ Sub-contractor & Partner onboarding
- ✓ Fully bespoke workflows mapped to your exact sales/service process
- ✓ Advanced analytics & detailed monthly reporting
- ✓ Multi-system integrations (CRM, finance, project management, ticketing)
- ✓ Estimated savings: ~£15,000+/month*
- ✓ Annual ROI: 15x–20x typical investment*

[Make an enquiry](#)

Example Workflow



Is ProjectPilot right for you?

| Feature/Metric |  ProjectPilot |  PROCORE® |  ORACLE® Aconex |  sage Intacct |
|--------------------------------------|--|--|--|--|
| Primary Focus | Client Communication | Project Management | Collaboration | Accounting |
| App Required | ✓ No Apps Needed | ✗ Mobile App Required | ✗ Mobile App Required | ✗ Mobile App Required |
| Email Based | ✓ 100% Email-Based System | ✗ Basic Messaging | ✗ Notifications Only | ✗ Billing Only |
| Automated Payment Chasing | ✓ Custom Sequences | ✓ Yes (Manually) | ✗ No Payment Functionality | ✓ Yes |
| Automated Progress Updates | ✓ Custom Milestone Triggers | ✓ Yes (Manually) | ✗ Central Dashboard | ✗ No Project Management |
| Integrates With Existing CRM Systems | ✓ Custom Built Integrations | ✓ Procore Is A CRM | ✗ No | ✗ Limited Integration |
| Implementation Time | ✓ Set Up In Days | ⚠ Weeks/Months | ⚠ Weeks/Months | ⚠ Weeks/Months |
| Staff Training Time | ✓ Minimal Involvement | ✗ Extensive | ✗ Extensive | ✗ Extensive |
| Project Management | ✗ Not Included | ✓ Yes | ✓ Yes | ✗ Finance Focussed |
| Finance Management | ✗ Not Included | ✓ Yes, Limited Tracking | ✗ Project Management Focussed | ✓ Yes |
| Mobile Optimised | ✓ Mobile-First Delivery | App Available | App Available | App Available |



Want to see how much time you could save?

Start here

or email us at
projectpilot@glasscreative.co.uk