

# Zero-Touch Customer Onboarding Redesign

Enderby Gas - AI Operations Portfolio - Brianna Bates - briannabates1221@gmail.com

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*Replacing phone-tag onboarding with self-serve intake, AI-personalized comms, and a status page customers can actually see.*

## Company

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Enderby Gas is a family-owned propane distributor in North Texas - 85 years in operation, roughly \$7M in annual revenue, about 20,000 active accounts, run by a lean team of fewer than 25. Core operations live in the Cargas ERP with IoT tank monitors in the field. Strong market position and a loyal base, but the customer-facing workflows were still almost entirely analog.

## Situation - the "before" workflow

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When someone needed propane service for the first time, the process ran on phone calls and manual coordination:

1. The prospect calls the dispatch line during business hours; if lines are busy, they wait on hold or leave a voicemail.
2. A dispatcher handwrites or types the intake - name, address, tank size, property type, heat source, install window.
3. The dispatcher re-keys all of it into Cargas.
4. Site visits get scheduled over the phone, usually two or three rounds of phone tag.
5. Quotes go out by email, or printed and mailed; install dates are booked manually.
6. The customer waits two to four weeks with no proactive updates - to check status, they call back in.

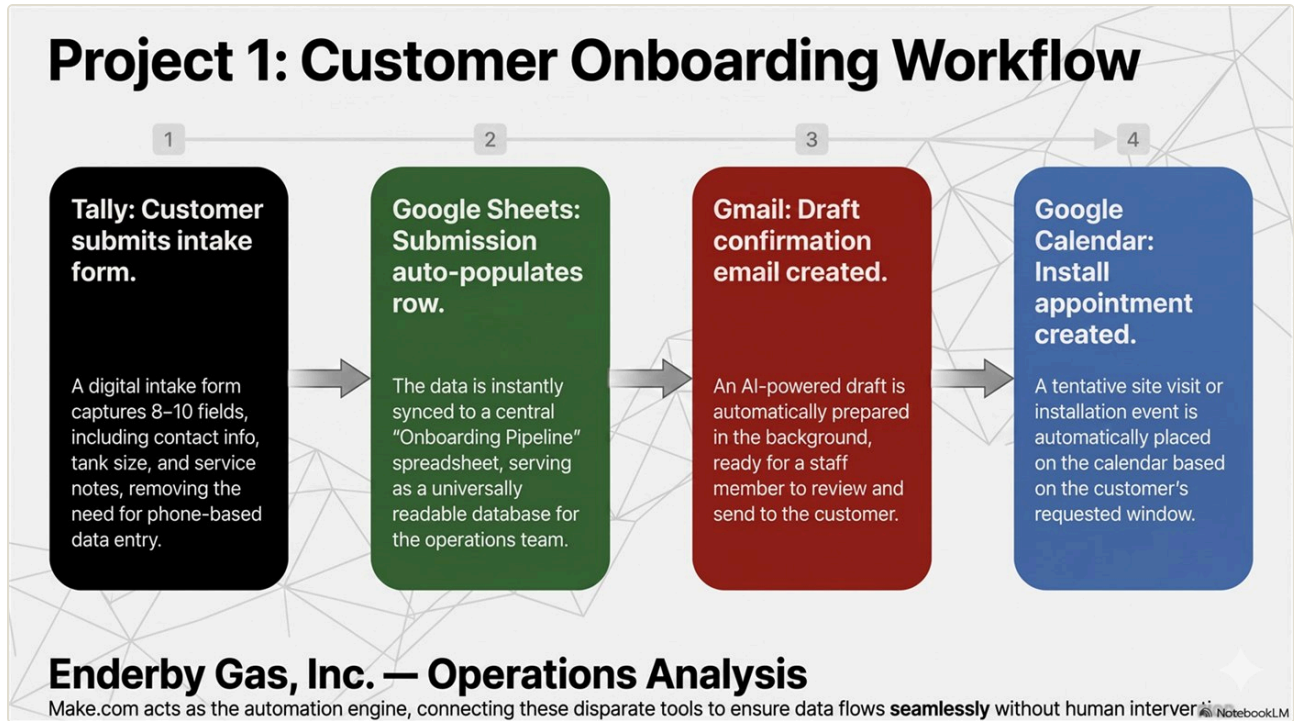
Four failure points: **manual phone intake** (42% of customers avoid calling support if they can), **no status visibility** (an information black box that triggers a second wave of calls), **scheduling chaos** (phone tag and disconnected calendars), and a **dropped pipeline** (44% of service-subscription cancellations happen in the first 90 days).

## Task

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Redesign the Acquire stage so prospects could self-serve intake, get instant confirmation, and see real-time status - without disrupting Cargas or the relationship-driven service the company is known for.

## Action - a six-layer "zero-touch" architecture



The end-to-end flow - Tally intake to Google Sheets to an AI-drafted Gmail confirmation to an auto-created Calendar event - with Make acting as the automation engine connecting each tool.

LAYER	TOOL	ROLE
Intake	Tally	Embedded web form, no login. Conditional logic branches commercial vs. residential - ten fields, but no prospect sees all ten.
Database	Google Sheets	Three tabs - raw intake, cleaned records, dashboard aggregates - so cleanup logic can change without breaking the dashboard.
Orchestration	Make	Two scenarios: one fires Sheets, Gmail, Calendar, and the portal in parallel; the second watches the sheet for status changes.
Communication	Gmail + Gemini	Confirmation and status emails drafted by Gemini using the customer's own variables, so it never feels canned.
Scheduling	Google Calendar	Auto-creates internal events with the full customer payload and assigns the right regional queue.
Status visibility	Google Sites	A per-customer status portal that updates as the install progresses - the call-deflection layer.

## Result - projected impact

Industry-benchmarked, because no proprietary Enderby data appears anywhere in the portfolio. These are expected results from comparable workflow-automation deployments.

METRIC	EXPECTED IMPROVEMENT	SOURCE CONTEXT
Onboarding cycle time	<b>67% faster</b>	Workflow automation in client onboarding
Time-to-live	<b>21 to 8 days</b>	AI-driven onboarding studies (62% reduction)
Data accuracy	<b>+88%</b>	Digital intake replacing manual transcription
Inbound status calls	<b>58% to 15%</b>	Self-service portals in utility / financial sectors
Early-life churn	<b>-25%</b>	Automated onboarding workflows
Annual hours saved	<b>240-360 hrs</b>	Routine task automation, per employee
Operational cost	<b>-20-30%</b>	Baseline workflow-automation initiatives

## Why it transfers to startups

This is the foundation of Customer Success Ops at most seed-Series B startups: intake form, route, log, notify, surface status. The specific tools change; the architecture doesn't. Multi-step Make orchestration with branching, AI-personalized communications, and self-serve status pages are the exact deliverables AI Ops and CS Ops roles ship in their first 90 days.

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*Enderby Gas is a real company used with the owner's permission. All names, customer data, and operational figures are simulated for portfolio purposes; impact figures are projected from published industry benchmarks, not deployed results. No proprietary records were used.*