Backofficecoo
SYSTEMS. STRATEGY. SUCCESS.

# Business Card to Follow-Up

A SIMPLE AUTOMATION FLOW FOR NETWORKING CONTACTS

**The Big Idea**

Take a picture of a business card once, then use automation to move the contact details into the place where you manage relationships — instead of manually retyping every card.

**Three simple actions:** Scan the card • Let automation save the contact • Follow up on the next step

## THE FLOW AT A GLANCE

*Navy steps are done by a person • Gold steps run automatically*

**1** **MEET** PERSON
Meet someone at a networking event and collect their business card.

▼

**2** **SCAN WITH COVVE** PERSON + APP
Use Covve to photograph the card and capture the contact details.

▼

**3** **CONNECT THROUGH ZAPIER** AUTOMATIC
Zapier passes the contact information to the destination you choose.

▼

**4** **SAVE THE CONTACT** AUTOMATIC
Send it to an email marketing list (such as Constant Contact), a CRM, a Google Sheet, an Excel/CSV workflow, or Outlook, depending on supported integrations.

▼

**5** **ADD A NEXT STEP** OWNER / ADMIN
Record where you met, what you discussed, who owns the follow-up, and when it is due.

▼

**6** **FOLLOW UP** OWNER / ADMIN
Send a personalized thank-you, share any promised information, and track replies or meetings.

**Planning Note**

This is a proposed workflow, not a verified live integration. Confirm current Covve, Zapier and destination-app compatibility, plan availability and pricing before setup. Software subscriptions are separate.

## CHOOSING YOUR DESTINATION

*Where the contact lands depends on how you manage relationships today*

| Option | Possible Destination | What to Confirm |
|---|---|---|
| **Email List** | Constant Contact or another email marketing platform | Confirm the list and fields map correctly, and that the contact has agreed to receive marketing email. |
| **CRM** | Your current CRM (for example, HoneyBook) | Check that Covve/Zapier supports the specific app and the fields you need. |
| **Spreadsheet** | Google Sheets or Excel/CSV | A CSV export may be manual unless an integration or automation is configured. |
| **Contacts** | Outlook contacts | Confirm a supported action; contacts alone may not track follow-up status. |

## WHO DOES WHAT

| Business Owner | Admin / Team Member | Covve + Zapier |
|---|---|---|
| Collects the card and scans it | Reviews new contacts for accuracy | Reads the card details |
| Adds a quick note on what was discussed | Adds the next step, owner and due date | Sends the contact to the chosen destination |
| Handles meaningful conversations | Sends or schedules the follow-up | Runs the same way every time |

## KEEP IT SIMPLE

Scanning captures the contact. The CRM or tracker stores the relationship. A next-action field and a reminder help make sure the contact does not get forgotten. These are separate steps, and the workflow should be tested before relying on it.

### Setup Checklist

- ☐ Choose the destination app for new contacts.
- ☐ Confirm Covve and Zapier support that app and the fields you need.
- ☐ Add fields for where you met, topic discussed, follow-up owner and due date.
- ☐ Test the flow with two or three cards before the next event.
- ☐ Check that each test contact landed correctly with no duplicates.
- ☐ Decide who reviews new contacts and when.

### Want This in Your Business?

Backoffice COO is happy to share information on the tools we use in our own office. If you would like this workflow implemented in your business, we will set it up, test it, and walk you through it.

**IMPLEMENTATION**

**$750**

Software subscriptions separate