

Plan your first LinkedIn workflow

Use this with ChatGPT or another supported assistant. Choose where work happens, who reviews it and what counts as a completed result.

1. Define the job

First useful outcome, source, relevance criteria and exclusions.

2. Confirm the account

FirstTouch team, connected sender, access owner and readiness.

3. Choose the review control

Flow Plan, Dynamic Action or inbox reply; reviewer, recipient and exact copy.

4. Pick the system of record

FirstTouch only / HubSpot native sync / other system with a verified adapter.

5. Record completion evidence

Observed action state; separate CRM result when required. A receipt is not a send.

6. Assign recovery and expansion

Who resolves ambiguous results? What must pass before more volume or clients?

Planning aid, not send authorization or an executed test. Confirm client isolation, access revocation and commercial permission before a multi-client deployment.

Read the guide: firsttouch.com/blog/how-to-connect-chatgpt-to-linkedin-and-crm