One Big Media Company

GOHIGHLEVEL SNAPSHOT · CHIROPRACTIC CLINICS

Chiropractic Snapshot: Setup & Walkthrough Guide

Install, configure and launch every workflow, pipeline and form.

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OVERVIEW

What's inside

A done-for-you GoHighLevel system for chiropractic clinics: instant lead follow-up, exam reminders, missed-visit recovery, reviews and inactive-patient reactivation, all with HIPAA-aware copy.

- 21 chiropractic-specific workflows, from speed-to-lead to care-plan recovery
- Sales pipeline rebuilt for clinics: New Patient Exam Booked, Exam Completed, Care Plan Presented
- Patient journey pipeline from Care Plan Started to Care Plan Completed
- Reactivation pipeline for inactive patients
- New Patient Exam calendar with confirmation, 24-hour and 2-hour reminders
- New-patient request form with insurance status, preferred visit time and referral source
- Patient feedback form that splits 4-5 star reviews from private service recovery
- Refer-a-friend form and referral thank-you automation
- Year-end HSA/FSA seasonal campaign ready to launch
- Wellness and maintenance visit reminders for patients who finished active care
- Clinic-specific custom fields including Care Plan Status, Visits Remaining and Last Visit Date
- 20 pre-filled custom values so the whole system re-brands in minutes
- HIPAA-aware copy that never asks for health details by text or email
- 12-step setup guide, 6-lesson install course and agency sales kit

Pipelines

Sales Pipeline

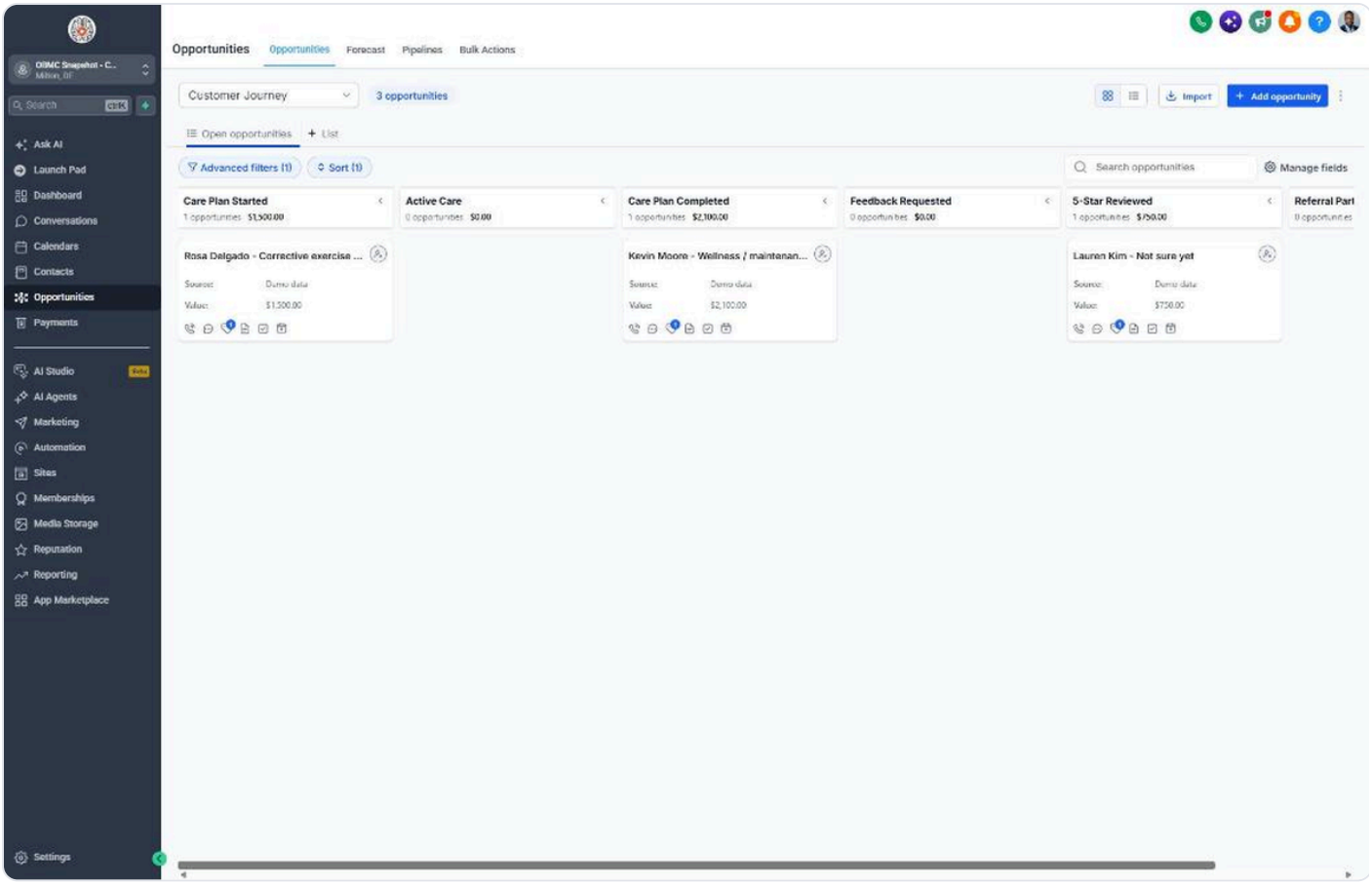
New Lead | Contacted | New Patient Exam Booked | Exam Completed | Care Plan Presented | Won | Lost | Long-Term Nurture

Customer Journey

Care Plan Started | Active Care | Care Plan Completed | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Customer Journey
3 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
Care Plan Started
1 opportunities $1,500.00
Active Care
0 opportunities $0.00
Care Plan Completed
1 opportunities $2,100.00
Feedback Requested
0 opportunities $0.00
5-Star Reviewed
1 opportunities $750.00
Referral Part
0 opportunities
Rosa Delgado - Corrective exercise ...
Source: Demo data
Value: $1,500.00
Kevin Moore - Wellness / maintenan...
Source: Demo data
Value: $2,100.00
Lauren Kim - Not sure yet
Source: Demo data
Value: $750.00
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings

INSTALL

12-step setup checklist

1. **Load the snapshot**
   Open the snapshot share link while logged in to your agency account to import it. Then go to Account Snapshots > Imported Snapshots, click the actions menu on the Chiropractic snapshot and choose Push to Sub-Account, or select it when creating a new sub-account under Sub-Accounts > Create Sub-Account.

2. **Complete the business profile**
   Inside the clinic's sub-account, go to Settings > Business Profile. Add the clinic name, address, phone, website, logo and correct time zone so reminders send at the right local time.

3. **Fill in custom values**
   Go to Settings > Custom Values and update business name, owner name (usually the lead doctor), phone, service area and every offer. Confirm the new-patient exam price and returning-patient offer with the clinic before going live.

4. **Turn on HIPAA settings if needed**
   If the clinic will store any protected health information, enable GoHighLevel's HIPAA option for the sub-account and have the clinic sign the BAA. Keep the custom fields focused on scheduling and status, not symptoms or diagnoses.

5. **Connect the phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number, then complete A2P 10DLC registration in the Trust Center. Use a 'healthcare appointment reminders and patient communication' use case with the sample messages from this snapshot.

6. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain such as mail.clinicname.com. Verify the DNS records so confirmations and reminders land in the inbox.

7. **Configure the New Patient Exam calendar**
   Go to Calendars > Calendar Settings, edit New Patient Exam, assign the doctors, and set availability, duration and buffers to match the clinic's new-patient blocks. Copy the calendar's booking link into the booking_link custom value.

8. **Customize and embed the forms**
   Go to Sites > Forms > Builder. Review the New Patient Request form, confirm the service list and insurance options, and embed it on the clinic website and Facebook lead ads landing page.

9. **Review the pipelines**
   Go to Opportunities > Pipelines and confirm the stages: New Patient Exam Booked, Exam Completed and Care Plan Presented in the Sales Pipeline, plus the patient journey and reactivation pipelines. Show the front desk how to drag a card to Won when a patient starts care.

10 **Connect Google reviews**
Go to Settings > Integrations and connect the clinic's Google Business Profile, then confirm the review link under Reputation > Settings and paste it into the review_link custom value.

11 **Assign alerts and publish workflows**
Go to Automation > Workflows. Open each workflow, set team alerts to the front desk manager's phone and email, confirm the From name, and publish. Decide how the front desk will add the 'niche campaign' tag for missed visits and the 'service due' tag for wellness reminders.

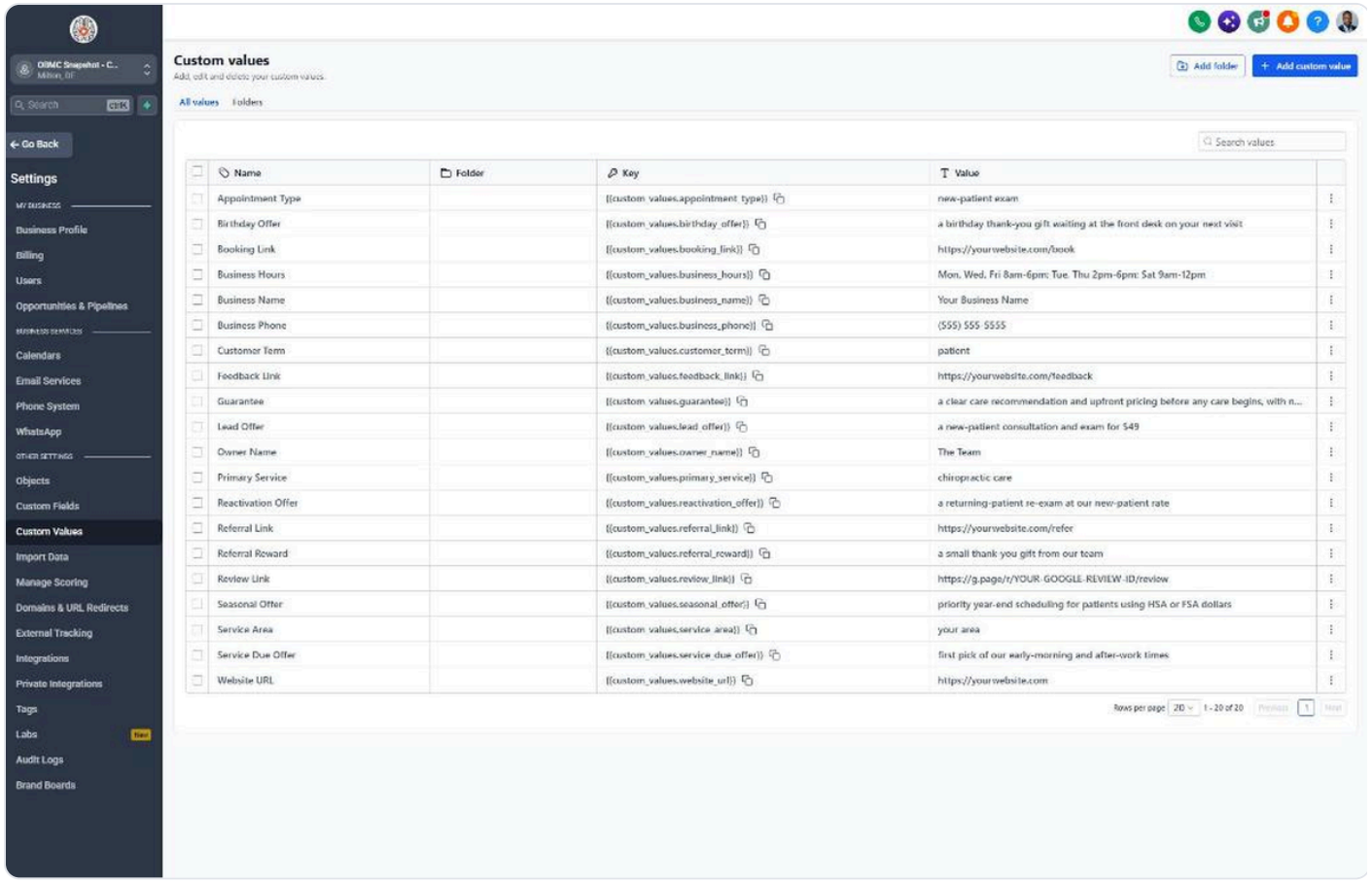
12 **Go live test**
Submit the form as a test contact, call the clinic number and let it ring out, then book a test exam. Confirm in Conversations that every text and email arrived, check the alert reached the front desk, and delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Chiropractic default / what to enter
Business Name	Your business name
Business Phone	Your business phone
Owner Name	Your owner name
Website URL	Your website url
Booking Link	Your booking link
Review Link	Your review link
Feedback Link	Your feedback link
Referral Link	Your referral link
Service Area	Your service area
Customer Term	patient
Appointment Type	new-patient exam
Primary Service	chiropractic care
Lead Offer	a new-patient consultation and exam for $49
Guarantee	a clear care recommendation and upfront pricing before any care begins, with no pressure to commit
Referral Reward	a small thank-you gift from our team
Reactivation Offer	a returning-patient re-exam at our new-patient rate
Seasonal Offer	priority year-end scheduling for patients using HSA or FSA dollars
Service Due Offer	first pick of our early-morning and after-work times
Birthday Offer	a birthday thank-you gift waiting at the front desk on your next visit
Business Hours	Mon, Wed, Fri 8am-6pm; Tue, Thu 2pm-6pm; Sat 9am-12pm


Custom values
Add, edit and delete your custom values.
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type
{{custom_values.appointment_type}}
new-patient exam
Birthday Offer
{{custom_values.birthday_offer}}
a birthday thank-you gift waiting at the front desk on your next visit
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon, Wed, Fri 8am-6pm; Tue, Thu 2pm-6pm; Sat 9am-12pm
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
patient
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
a clear care recommendation and upfront pricing before any care begins, with n...
Lead Offer
{{custom_values.lead_offer}}
a new-patient consultation and exam for $49
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
chiropractic care
Reactivation Offer
{{custom_values.reactivation_offer}}
a returning-patient re-exam at our new-patient rate
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a small thank you gift from our team
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
priority year-end scheduling for patients using HSA or FSA dollars
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
first pick of our early-morning and after-work times
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
Go Back
Settings
MY BUSINESS
Business Profile
Billing
Users
Opportunities & Pipelines
BUSINESS SERVICES
Calendars
Email Services
Phone System
WhatsApp
OTHER SETTINGS
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
New
Audit Logs
Brand Boards

WALKTHROUGH

All 21 workflows

01 · New Lead → Speed-to-Lead + 7-Day Follow-Up

TRIGGER Form 01 submitted, or tag 'start lead nurture' added

STEPS Tag new lead → Create opportunity in Sales Pipeline → New Lead → Instant SMS reply with booking link → Instant email: what happens next → Text + email alert to the team → Day 1 SMS follow-up → Day 2 email: why customers choose you → Day 4 SMS: quick question → Day 7 email: close the loop → Move to Long-Term Nurture

Stops when the lead replies

> Hi **first name**, thanks for reaching out to **business name**! We'd love to get you in for **lead offer**. Pick a time here: **booking link** or reply and we'll call you. Reply STOP to opt out.

02 · Missed Call → Instant Text-Back

TRIGGER Inbound call is busy, no-answer or voicemail

STEPS Text-back within seconds → Create opportunity → New Lead (source: missed call) → Text alert to the team

Runs every time

> Hi, this is **business name**. Sorry we missed your call! We're likely with a patient right now. Reply here and we'll get right back to you, or book a visit anytime: **booking link** Reply STOP to opt out.

03 · Customer Replied → Hot Lead Alert

TRIGGER Customer replies (SMS, email, chat)

STEPS Tag hot lead → Text the team the reply so nobody waits

Runs every time

04 · Appointment Booked → Confirm + Reminders

TRIGGER Customer books on the calendar

STEPS Tag appointment booked → Move deal → Appointment Booked → Confirmation SMS + email with reschedule link → Team alert → 24-hour reminder SMS → 2-hour reminder SMS

Runs for every booking

> You're all set, **first name**! Your **appointment type** at **business name** is **start time**. Please arrive 15 minutes early for paperwork. Need to change it? **reschedule link**

05 · No-Show → Reschedule Recovery

TRIGGER Appointment status changes to No-show

STEPS Tag no-show → Sorry-we-missed-you SMS + email with booking link → Team alert → Day 1 rebook SMS → Day 3 final SMS

Stops when they reply

> Hi **first name**, we missed you at **business name** today. No problem, schedules get busy. Want to pick a new time for your **appointment type**? **booking link**

06 · Appointment Completed → Proposal Prep

TRIGGER Appointment status changes to Showed

STEPS Move deal → Appointment Completed → Thank-you SMS → Team alert: send the proposal within 24 hours

Runs every time

07 · Proposal Sent → Follow-Up Sequence

TRIGGER Deal moves to Proposal Sent

STEPS Day 1 SMS check-in → Day 3 email: questions? → Day 6 SMS: hold your spot → Day 13 final email → Team alert if still no answer

Stops when they reply

> Hi **first name**, it's **business name**. Any questions about the care plan the doctor went over with you? We're happy to explain scheduling, insurance or payment options. Just reply.

08 · Deal Won → Welcome + Customer Journey

TRIGGER Deal moves to Won

STEPS Tag customer, remove lead tags → Create Customer Journey deal → Scheduled → Welcome SMS → Welcome email: what happens next → Team alert

Runs every time

> Welcome to **business name**, **first name**! We're glad you're here. Save this number, it's the easiest way to reach our front desk for scheduling questions.

09 · Deal Lost → 30/60/90-Day Nurture

TRIGGER Deal moves to Lost

STEPS Tag lost → Day 30 check-in email → Day 60 SMS → Day 90 email with comeback offer → Move to Long-Term Nurture

Stops when they reply

10 · Job Completed → Feedback Request

TRIGGER Customer Journey deal moves to Completed

STEPS Move → Feedback Requested → Tag review requested → SMS + email asking for a private rating → Day 2 reminder SMS

Runs every time

> Hi **first name**, thank you for trusting **business name**! How has your experience with our team been? It takes about 20 seconds: **feedback link**

11 · Feedback Submitted → Review Ask or Service Recovery

TRIGGER Form 02 submitted

STEPS If rating is 4-5: tag promoter, send Google review link, move → 5-Star Reviewed → If rating is 1-3: tag detractor, apology message, urgent team alert to fix it privately

Runs every time

12 · Happy Customer → Referral Request

TRIGGER Tag promoter added

STEPS Wait 3 days → Referral SMS with reward → Referral email with reward

Once per contact

> Hi **first name**, thank you for the kind words! If a friend or family member has been meaning to see a chiropractor, we'd be glad to help. Share this link and they'll get our new-patient offer: **referral link**

13 · Referral Received → Thank You + Team Alert

TRIGGER Form 03 submitted

STEPS Move referrer → Referral Partner → Tag referral partner → Thank-you SMS → Team alert with the friend's name and phone

Runs every time

14 · Database Reactivation Campaign

TRIGGER Tag 'start reactivation' added (bulk-tag an imported list)

STEPS Create Reactivation deal → Campaign Sent → SMS 1: still looking for help? → Day 2 SMS: past-customer offer → Day 5 email offer → Day 10 last-call SMS → Remove the campaign tag

Stops when they reply

> Hi **first name**, it's **business name**. It's been a while since your last visit and we wanted to check in. Would you like to get back on the schedule? Reply STOP to opt out.

15 · Invoice Sent → Payment Reminders
TRIGGER Invoice sent
STEPS Wait 3 days → Friendly SMS reminder → Day 6 email reminder → Day 10 team alert for a personal call
Payments workflow (16) stops it when the invoice is paid

16 · Payment Received → Thank You
TRIGGER Payment received
STEPS Tag customer, remove past-due tag → Thank-you SMS → Team alert
Runs every time

17 · Birthday → Gift Offer
TRIGGER Contact's birthday (date of birth on file)
STEPS Birthday SMS with gift offer → Birthday email
Yearly

18 · Stale Deal Alert (7 Days No Movement)
TRIGGER Sales Pipeline deal idle 7+ days
STEPS Text + email alert to the team
Runs every time

19 · Service Due → Rebook Reminder
TRIGGER Tag 'service due' added
STEPS Service-due SMS with offer → Day 3 email → Day 7 final SMS → Remove the tag
Stops when they reply

Hi **first name**, **business name** here. You're due for your next wellness visit. Book now and get **service due offer**: **booking link** Reply STOP to opt out.

20 · Seasonal Promo Campaign
TRIGGER Tag 'seasonal promo' added
STEPS Offer SMS → Day 2 email → Day 5 last-call SMS → Remove the tag
Stops when they reply

Hi **first name**, **business name** here. Have HSA or FSA dollars left this year? Chiropractic visits are often an eligible expense (check your plan). Year-end times are filling up: **booking link** Reply STOP to opt out.

21 · Missed Visit → Care Plan Recovery

TRIGGER Tag 'niche campaign' added

STEPS Niche SMS → Day 2 email → Day 5 follow-up SMS → Remove the tag

Stops when they reply

Hi **first name**, we missed you at **business name** today. No worries! Let's get your next visit on the calendar so you stay on track with your plan: **booking link** Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	First reply to every new lead within 5 minutes during office hours	Conversations and the Sales Pipeline opportunity timeline
New-patient exams booked	Grow booked exams month over month from the same lead volume	Opportunities > Pipelines, New Patient Exam Booked stage
Exam show rate	Aim for 80% or more of booked new-patient exams showing up	Calendars > Appointments and Reporting > Appointment Report
Care plan acceptance	Track the share of completed exams that move to Won and improve it each quarter	Opportunities > Pipelines, Care Plan Presented vs Won
Missed-visit recovery	Rebook the majority of patients who enter workflow 21	Automation > Workflows > 21 > Execution Logs and Reactivation pipeline
New Google reviews	Earn several new 5-star reviews every month	Reputation > Overview

Compliance notes

- HIPAA: never ask for or send symptoms, diagnoses or treatment details by SMS or email. If the clinic stores PHI in GoHighLevel, enable the HIPAA option, sign the BAA, and limit access to staff who need it.
- TCPA and A2P 10DLC: only text people who gave consent (form opt-in checkbox or texted the clinic first), keep 'Reply STOP to opt out' on first messages, and register the brand and campaign before sending.
- No outcome claims: don't promise pain relief, cures or results in any message or ad. Describe the visit and the process, not the outcome.
- Discounted or free exam offers: many states require specific disclosure language for reduced-fee or free services, and offers to Medicare or Medicaid patients can raise anti-inducement issues. Have the clinic confirm offer wording with its compliance advisor.
- Reviews and referrals: never offer anything in exchange for a review, keep referral thank-you gifts of nominal value, and don't reply to reviews in a way that confirms someone is a patient.

Mini-course outline

1. **Install and brand the chiropractic snapshot**: Get the snapshot into the clinic's sub-account and branded with the clinic's details and offers.
2. **Capture new patients and respond in seconds**: Make sure every web lead and missed call gets an instant, HIPAA-aware response.

3. **Book exams and cut no-shows**: Set up the New Patient Exam calendar so booked exams actually show up.
4. **Move patients from exam to care plan**: Use the Sales Pipeline to track every new patient from exam to accepted care plan.
5. **Reviews, referrals and inactive patients**: Turn happy patients into reviews and referrals, and bring inactive patients back.
6. **Launch care-plan recovery and optimize**: Go live with missed-visit recovery and track the numbers that matter to the clinic.

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.