One Big Media Company

GOHIGHLEVEL SNAPSHOT · CLEANING SERVICES (RESIDENTIAL & COMMERCIAL)

Cleaning 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 maid services and commercial cleaners that answers every lead, follows up on every quote and converts first cleans into recurring plans.

- 21 pre-built workflows written for residential and commercial cleaning companies
- First clean to recurring plan conversion campaign
- Quote follow-up sequence answering first-clean pricing, entry and skip questions
- Missed-call text-back for owners who are on a job
- Sales pipeline with Walkthrough Booked, Walkthrough Done and Quote Sent stages
- Customer Journey from First Clean Scheduled to Referral Partner
- Service-due rebooking reminders based on each client's cleaning frequency
- Spring and pre-holiday deep-clean promo campaign
- Quote form asking property type, bed/bath count and frequency
- "Free Walkthrough & Quote" calendar
- 7 cleaning custom fields including square footage, pets, entry instructions and move date
- Review request with private service recovery and a re-clean promise
- Setup guide, 6-lesson course outline and agency sales kit

Pipelines

Sales Pipeline

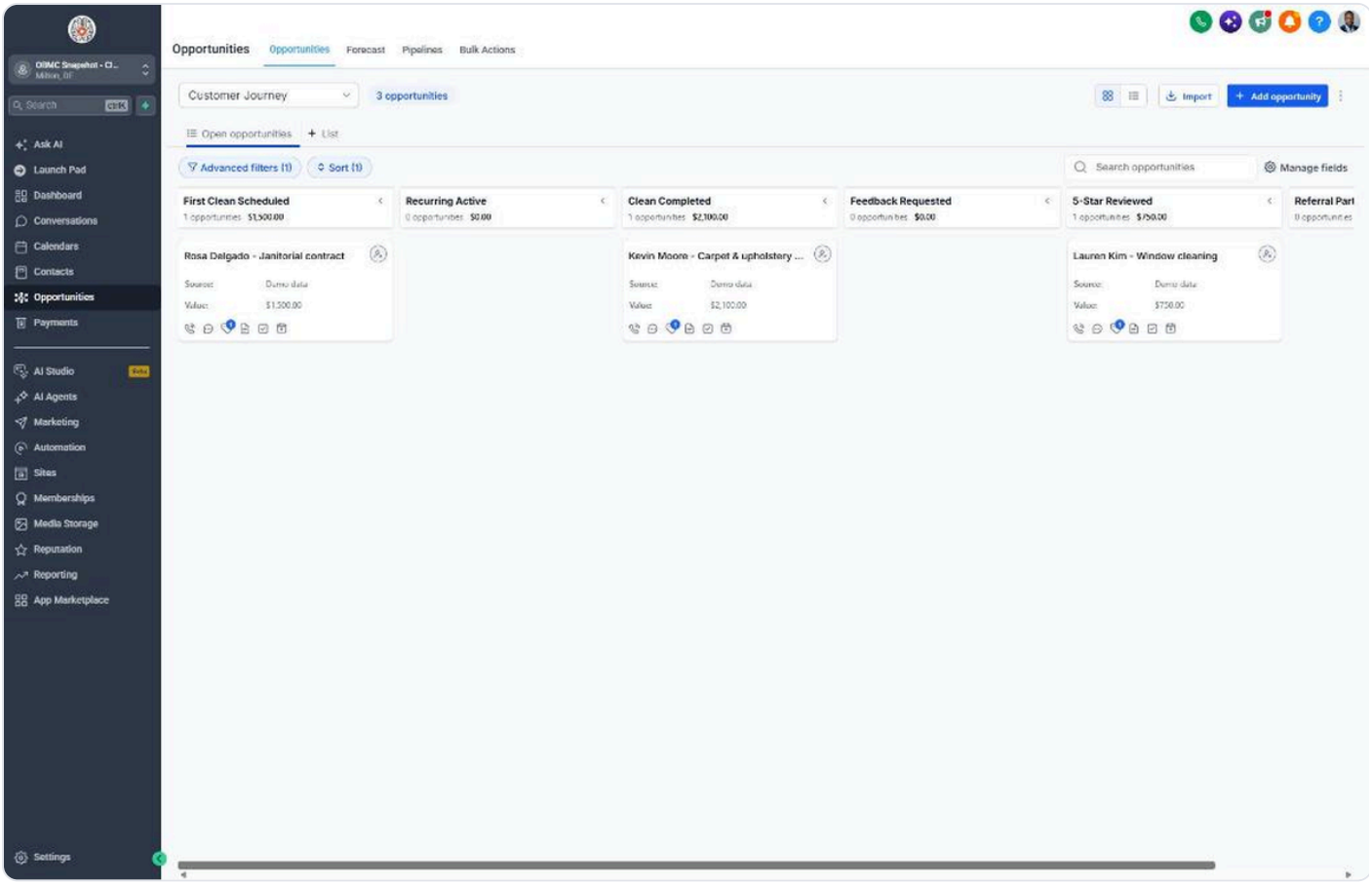
New Lead | Contacted | Walkthrough Booked | Walkthrough Done | Quote Sent | Won | Lost | Long-Term Nurture

Customer Journey

First Clean Scheduled | Recurring Active | Clean 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
First Clean Scheduled
1 opportunities $1,500.00
Recurring Active
0 opportunities $0.00
Clean 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 - Janitorial contract
Source: Demo data
Value: $1,500.00
Kevin Moore - Carpet & upholstery ...
Source: Demo data
Value: $2,100.00
Lauren Kim - Window cleaning
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**
   In Agency view, go to Account Snapshots > Imported Snapshots and load the Cleaning snapshot into a new or existing sub-account. Open the sub-account when the import finishes.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the company name, address, phone, website and time zone. Message timing depends on the time zone, so confirm it.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in Business Name, Owner Name, Business Phone, Service Area and all four links. Adjust the offers, especially Reactivation Offer and Seasonal Offer, to match real pricing.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers, buy or port a local number, and complete A2P 10DLC registration under the Trust Center tab with the company's legal name and EIN. Don't send campaigns until it's approved.

5. **Connect email sending**
   Go to Settings > Email Services and add a dedicated sending domain. Add the DNS records at your domain host and verify so quotes and offers land in the inbox.

6. **Configure the walkthrough calendar**
   Go to Calendars > Calendar Settings and open "Free Walkthrough & Quote." Assign the estimator, set availability, add drive-time buffers and paste the booking link into the Booking Link custom value.

7. **Review the pipelines**
   Go to Opportunities > Pipelines and confirm the Walkthrough Booked, Walkthrough Done and Quote Sent stages. Add average recurring-client values so you can see pipeline revenue.

8. **Connect Google reviews**
   Go to Settings > Integrations and connect Google Business Profile, then copy the review link from Reputation > Settings into the Review Link custom value.

9. **Customize and embed the quote form**
   Go to Sites > Forms > Builder and open "01 · Request a Quote / Booking Request." Confirm Property Type, Bedrooms / Bathrooms and Cleaning Frequency are on it, then embed it on the website's booking page.

10. **Import past and current clients**
    Go to Contacts > Import and upload clients who have agreed to receive texts. Map Last Service Date, Cleaning Frequency and Next Service Due, and tag active clients 'customer'.

11 **Publish the workflows**

Go to Automation > Workflows, review each workflow's copy and publish. Start with 01, 02, 04, 05, 10 and 11. Add a step to Workflow 10 or tag first-clean clients 'niche campaign' to start Workflow 21 after their first clean.

12 **Go live test**

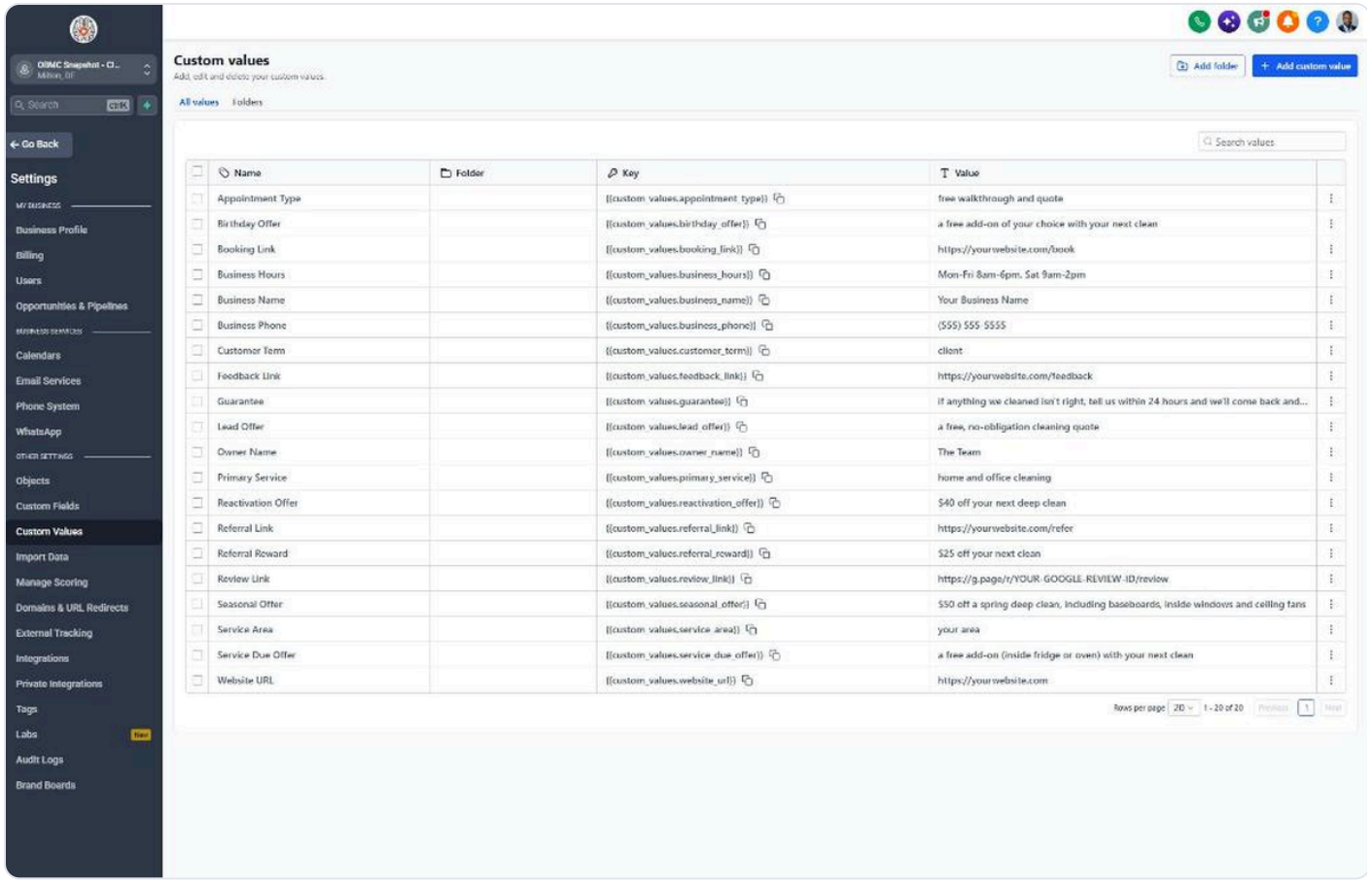
Submit the quote form with your own details, call the business line and let it ring out, then book a test walkthrough. Confirm every text, email and team alert arrives, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Cleaning 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	client
Appointment Type	free walkthrough and quote
Primary Service	home and office cleaning
Lead Offer	a free, no-obligation cleaning quote
Guarantee	if anything we cleaned isn't right, tell us within 24 hours and we'll come back and re-clean it free
Referral Reward	$25 off your next clean
Reactivation Offer	$40 off your next deep clean
Seasonal Offer	$50 off a spring deep clean, including baseboards, inside windows and ceiling fans
Service Due Offer	a free add-on (inside fridge or oven) with your next clean
Birthday Offer	a free add-on of your choice with your next clean
Business Hours	Mon-Fri 8am-6pm, Sat 9am-2pm


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}}
free walkthrough and quote
Birthday Offer
{{custom_values.birthday_offer}}
a free add-on of your choice with your next clean
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 8am-6pm, Sat 9am-2pm
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
client
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
if anything we cleaned isn't right, tell us within 24 hours and we'll come back and...
Lead Offer
{{custom_values.lead_offer}}
a free, no-obligation cleaning quote
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
home and office cleaning
Reactivation Offer
{{custom_values.reactivation_offer}}
$40 off your next deep clean
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
$25 off your next clean
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
$50 off a spring deep clean, including baseboards, inside windows and ceiling fans
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free add-on (inside fridge or oven) with your next clean
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**, it's **owner name** with **business name**. Thanks for reaching out! I'd love to get you **lead offer**. Is a quick call today okay, or pick a time: **booking link** 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 probably mid-clean! What can we help with? Reply here, or book a quote: **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 booked, **first name**! Your **appointment type** with **business name** is set for **start time**. 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**, sorry we missed you for your walkthrough today! No worries at all. Want to pick a new time? **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**, did you get a chance to look at your cleaning quote from **business name**? Happy to adjust the frequency or checklist. Just reply here.

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 excited to take this off your plate. We'll confirm your first clean shortly. Save this number for entry notes, skips and 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**, thanks for choosing **business name**! How did your clean turn out? It takes 20 seconds to tell us: **feedback link** Reply STOP to opt out.

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**, thanks for the kind words! Know a friend or coworker who could use a cleaner? Send them our way and we'll thank you with **referral reward**: **referral link** Reply STOP to opt out.

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 **owner name** from **business name**. It's been a while! Would a fresh deep clean help right now? 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**, it's **business name**. It's been a few weeks since your last clean. Want to get back on the calendar? 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. Spring cleaning season is here: **seasonal offer**. Want a spot? Reply YES or book: **booking link** Reply STOP to opt out.

21 · First Clean to Recurring Plan Conversion

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**, **owner name** from **business name**. Hope you're enjoying the clean! Want to keep it this way? We can hold a regular weekly or bi-weekly spot at our recurring rate. Reply YES for details. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	Aim to respond to every quote request within 5 minutes during business hours	Conversations and contact activity
Quote-to-booked rate	Track monthly and aim to improve it each quarter	Opportunities > Sales Pipeline, Quote Sent to Won
One-time to recurring conversion	Aim to convert a growing share of first cleans into recurring plans	Contacts filtered by Cleaning Frequency, plus Workflow 21 stats
Recurring client count	Grow active recurring clients every month	Opportunities > Customer Journey, Recurring Active stage
Google reviews	Aim for new reviews every week	Reputation > Overview
Schedule gaps recovered	Rebook missed walkthroughs and lapsed clients within the week	Workflow 05 and 19 enrollment stats in Automation > Workflows

Compliance notes

- Complete A2P 10DLC registration before texting. Describe your use case as quote follow-up, appointment reminders and promotional offers.
- Get written consent to text on your quote and booking forms. Marketing texts like the recurring plan and seasonal campaigns need prior express written consent under the TCPA.
- Send campaigns between 8am and 8pm in the client's local time and check for stricter state rules on texting hours and frequency.
- Keep entry codes and alarm details in the Entry Instructions field and limit who can see contacts in Settings > My Staff. Never send door codes back by text.
- Avoid claims like 'germ-free' or 'kills 99.9%' unless you can document them for the products you use.

Mini-course outline

1. **Install the Snapshot and Brand It for Your Cleaning Company**: Load the snapshot and make every message sound like the cleaning company.
2. **Answer Every Quote Request in Seconds**: Make sure every form fill and missed call gets an instant, human reply.
3. **Book Walkthroughs and Recover No-Shows**: Get walkthroughs booked and make sure they happen.
4. **Follow Up on Every Quote**: Move every quote through the pipeline until it's won or closed.

5. **Reviews, Referrals and Bringing Past Clients Back**: Turn happy clients into reviews and referrals and bring lapsed ones back.
6. **Launch the Recurring Plan Engine**: Convert first cleans into recurring clients and keep the schedule full.

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