One Big Media Company

🎯 GOHIGHLEVEL SNAPSHOT · COACHES & CONSULTANTS

Coaching Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

What's inside

A complete GoHighLevel system for coaches and consultants: discovery call booking, application and webinar follow-up, enrollment sequences, and renewals that run while you coach.

- 21 coaching-specific workflows with SMS and email copy written in a coach's voice
- Enrollment pipeline from New Lead / Applicant to Enrolled
- Client journey pipeline from Onboarding to Program Completed
- Reactivation pipeline for past leads and alumni
- Discovery call form with program interest, biggest challenge, and timeline questions
- Free Discovery Call calendar with prep-question confirmations and reminders
- Webinar & Challenge follow-up campaign that branches by attendance
- Offer follow-up sequence with enrollment FAQs
- Program-end progress review workflow for renewals and upgrades
- Alumni reactivation with a strategy reset session offer
- Review and referral workflows for program graduates
- Custom fields for lead source event, attendance, and application status
- 20 pre-filled custom values for coaching and consulting
- Setup guide, 6-lesson course, KPI targets, and agency sales scripts

Pipelines

Sales Pipeline

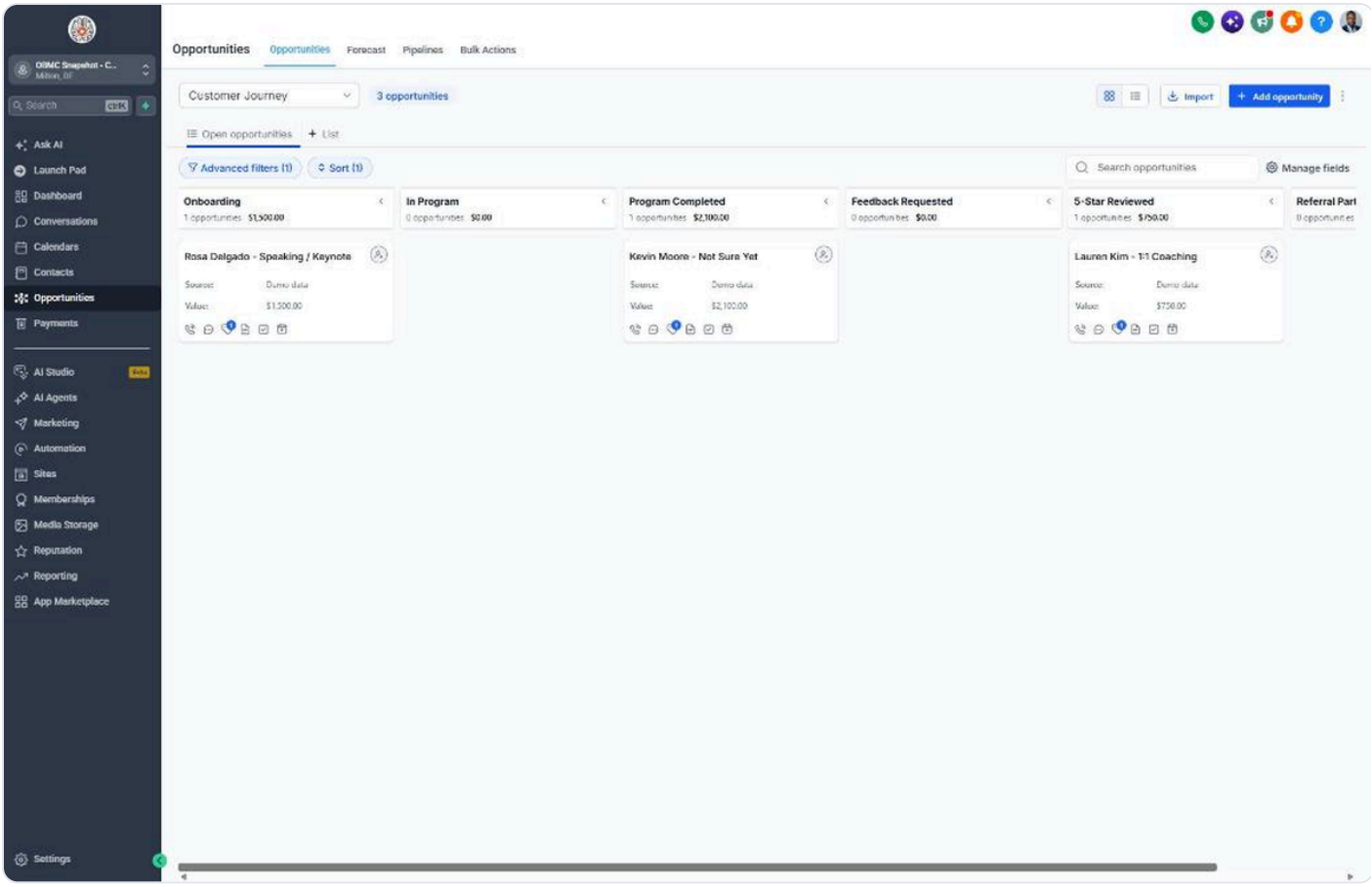
New Lead / Applicant | Contacted | Discovery Call Booked | Discovery Call Completed | Offer Sent | Enrolled | Not a Fit / Declined | Long-Term Nurture

Customer Journey

Onboarding | In Program | Program 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
Onboarding
1 opportunities $1,500.00
In Program
0 opportunities $0.00
Program 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 - Speaking / Keynote
Source: Demo data
Value: $1,500.00
Kevin Moore - Not Sure Yet
Source: Demo data
Value: $2,100.00
Lauren Kim - 1:1 Coaching
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, find the OBMC Coaching snapshot, and click Load into the coach's sub-account. Import all assets, then switch into the sub-account.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the business name, website, phone, and time zone. Coaches with international clients should double-check the time zone, since reminders depend on it.

3. **Update custom values**
   Go to Settings > Custom Values and update Business Name, Owner Name, Business Phone, Booking Link, Review Link, Feedback Link, and Referral Link. Rewrite the offer values in the coach's own words.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number, then complete A2P 10DLC registration in Settings > Phone Numbers > Trust Center. Forward calls to the coach's mobile so missed-call text-back works during sessions.

5. **Set up email sending**
   Go to Settings > Email Services and connect a dedicated sending domain. Add the DNS records, verify, and set the from name to the coach's first and last name so emails feel personal.

6. **Configure the discovery call calendar**
   Go to Calendars > Calendar Settings, open Free Discovery Call, set availability, duration, buffers, and a Zoom or Google Meet location. Copy the calendar link into the Booking Link custom value.

7. **Customize the lead and application forms**
   Go to Sites > Forms > Builder and open the booking request form. Confirm Program Interest, Biggest Challenge, and Timeline to Start, add consent language, and embed it on the website and link-in-bio page.

8. **Connect webinar and challenge registrations**
   In Automation > Workflows, open workflow 21 and set the trigger to your webinar registration form or a 'webinar-registered' tag. Make sure attendance updates the Event Attendance field via tag or integration.

9. **Review the pipelines**
   Go to Opportunities > Pipelines and review the enrollment, client journey, and reactivation pipelines. Rename stages if the coach uses applications or strategy sessions.

10 **Connect reviews and payments**
Go to Reputation > Settings to connect Google Business Profile (or set Review Link to a testimonial form), and go to Payments > Integrations to connect Stripe so invoices and payment plans trigger workflows 15 and 16.

11 **Import past leads and alumni**
Go to Contacts > Import and upload past leads and alumni with consent, tagging them 'past-lead' or 'alumni'. Add Program End Date for current clients so workflow 19 fires on time.

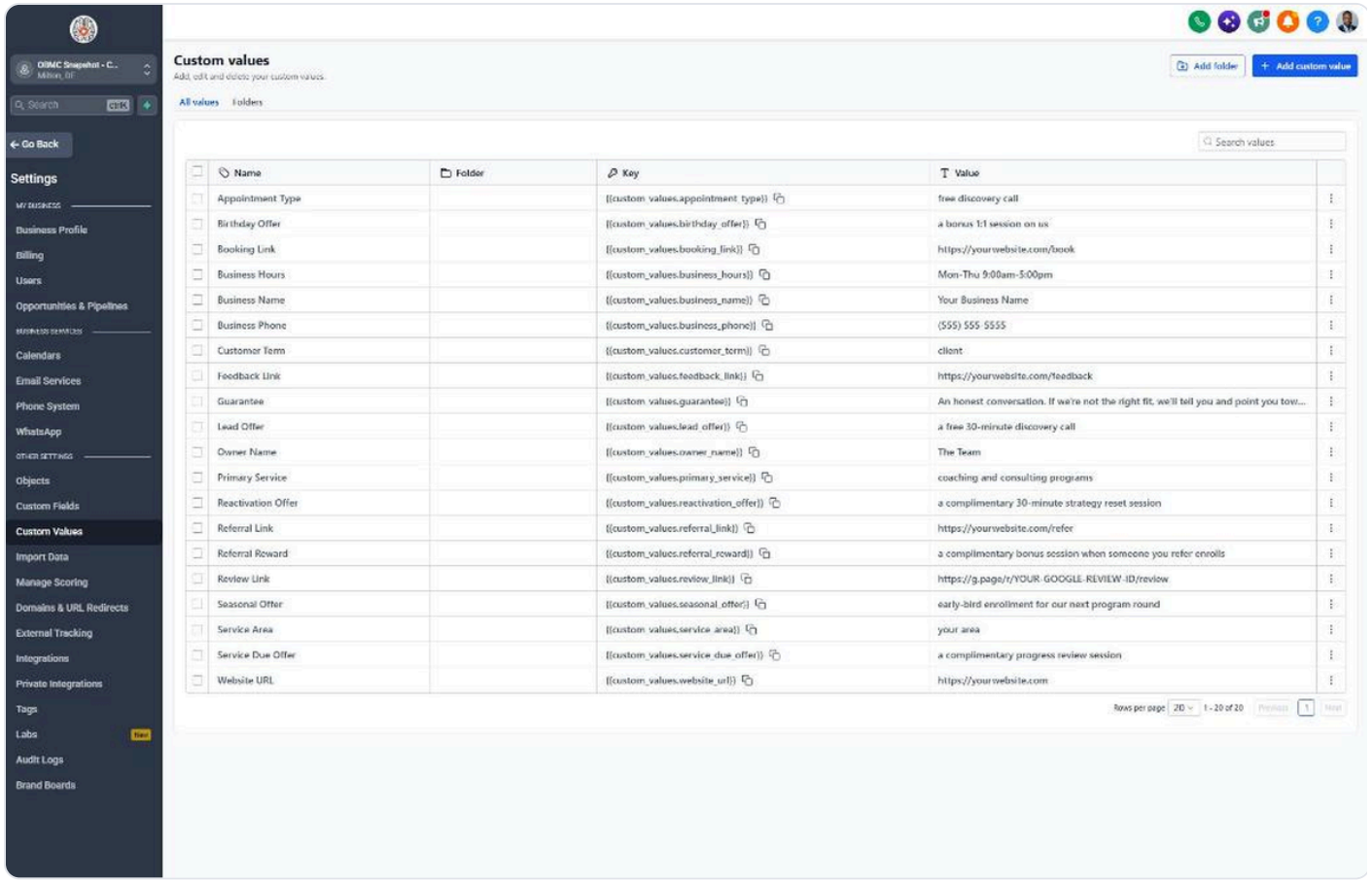
12 **Go live test**
Publish all workflows in Automation > Workflows. Register for your own webinar, submit the lead form, book and no-show a test discovery call, and move a test deal to Enrolled to confirm every message and stage move.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Coaching 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 discovery call
Primary Service	coaching and consulting programs
Lead Offer	a free 30-minute discovery call
Guarantee	An honest conversation. If we're not the right fit, we'll tell you and point you toward what is
Referral Reward	a complimentary bonus session when someone you refer enrolls
Reactivation Offer	a complimentary 30-minute strategy reset session
Seasonal Offer	early-bird enrollment for our next program round
Service Due Offer	a complimentary progress review session
Birthday Offer	a bonus 1:1 session on us
Business Hours	Mon-Thu 9:00am-5:00pm


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 discovery call
Birthday Offer
{{custom_values.birthday_offer}}
a bonus 1:1 session on us
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Thu 9:00am-5:00pm
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}}
An honest conversation. If we're not the right fit, we'll tell you and point you tow...
Lead Offer
{{custom_values.lead_offer}}
a free 30-minute discovery call
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
coaching and consulting programs
Reactivation Offer
{{custom_values.reactivation_offer}}
a complimentary 30-minute strategy reset session
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a complimentary bonus session when someone you refer enrolls
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
early-bird enrollment for our next program round
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a complimentary progress review session
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
Settings
Go Back
Business Profile
Billing
Users
Opportunities & Pipelines
Calendars
Email Services
Phone System
WhatsApp
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** from **business name**. Thanks for reaching out! What's the one thing you most want to change in the next 90 days? Reply here, I read these myself. 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 I missed your call! I'm likely with a client. What can I help with? Reply here, or book a discovery call 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

> Hi **first name**, you're booked for your **appointment type** with **business name** on **only start date** at **start time**. Looking forward to it! Need to move 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**, looks like we missed each other for our call today. No worries! 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**, I just sent the details on working together to your email. Take a look, and reply here with any questions. Happy to hop on a quick call too.

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 aboard, **first name**! I'm excited to work with you. Check your email for your onboarding steps and first session link. Save this number. You can reach me here anytime.

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**, congrats on completing the program! I'd love your honest feedback on the experience. It takes about a minute: **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**, I've loved working with you! Know someone who's ready to make a change like you did? Send them my way here: **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 **owner name** from **business name**. It's been a while! How are things going with your goals? I'm offering **reactivation offer**. Want one? Reply YES. 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**, your program is wrapping up soon! Let's look at how far you've come and map out what's next. Book **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**, it's **business name**. Planning season is here, the perfect time to set your next 90 days on purpose. We're opening **seasonal offer**. Want the details? Reply YES. Reply STOP to opt out.

21 · Webinar & Challenge → Application Follow-Up

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**, it's **owner name**. Thanks for signing up for the training! If you want help applying it to your situation, book a free discovery call here: **booking link** Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Lead-to-call booking rate	Grow the share of new leads who book a discovery call each month	Opportunities > Pipelines (Discovery Call Booked stage)
Webinar registrant-to-call rate	Increase calls booked per webinar or challenge from one event to the next	Automation > Workflows > workflow 21 stats and Calendars > Appointments
Discovery call show rate	Keep no-shows low with prep-question reminders and easy rescheduling	Calendars > Appointments (showed vs. no-show)
Call-to-enrollment rate	Improve the share of completed calls that enroll quarter over quarter	Opportunities > Pipelines (Discovery Call Completed vs. Enrolled)
Renewal and upgrade rate	Book a progress review with every client before their program ends	Contacts > Smart Lists filtered by Program End Date and workflow 19 stats
Speed to first reply	Every new lead hears from you in under 5 minutes	Conversations and contact timelines in Contacts

Compliance notes

- Avoid income, earnings, or specific results claims. The FTC actively enforces rules on earnings claims in coaching and business-opportunity marketing, and any claims must be truthful and substantiated.
- Only use real testimonials with permission, and disclose any material connection such as free sessions or affiliate payments per the FTC Endorsement Guides.
- Health, wellness, and life coaches should state that coaching is not therapy, medical care, or a substitute for professional treatment, and should not collect health details by SMS.
- Register A2P 10DLC and capture express written consent on every opt-in, including webinar registration forms, and honor STOP replies immediately.
- Avoid fake urgency such as countdown timers or 'only 2 spots left' unless they are true. Deceptive scarcity can violate FTC rules and erodes trust.

Mini-course outline

1. **Install the Snapshot and Make It Sound Like You**: Load the snapshot and put every message in the coach's own voice.
2. **Capture Leads and Follow Up in Moments**: Get every lead from forms, DMs, and calls into a consistent follow-up.
3. **Book Discovery Calls and Recover No-Shows**: Fill your calendar with prepared leads who show up.

4. **Run the Enrollment Pipeline and Offer Follow-Up**: Move every lead from call to decision with consistent follow-up.
5. **Reviews, Referrals, and Alumni Reactivation**: Turn graduates into reviews and introductions, and bring past leads back.
6. **Launch Webinar Follow-Up and Program Renewals**: Make every live event and program ending produce booked calls.

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