One Big Media Company

💍 GOHIGHLEVEL SNAPSHOT · WEDDING & EVENT PROS (VENUES, PHOTOGRAPHERS, PLANNERS)

Wedding & Events 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 venues, photographers, and planners: instant inquiry replies, tour booking, proposal and date-hold follow-up, reviews, and anniversary nurture.

- 21 wedding-and-event workflows with warm, on-brand SMS and email copy
- Booking pipeline from New Inquiry to Booked (Contract + Retainer)
- Event journey pipeline from Planning to Event Delivered and Referral Partner
- Reactivation pipeline for past inquiries still planning
- Inquiry form with event date, event type, and guest count
- Tour & Consultation calendar with confirmations and reminders
- Proposal follow-up sequence with booking FAQs
- Date Hold & Proposal Decision campaign driven by the Date Hold Expires field
- Anniversary nurture workflow driven by the Event Date field
- Engagement-season promo campaign
- Missed-call text-back for when you're at an event
- Review and referral workflows timed after the event
- Custom fields for budget range, date flexibility, and venue status
- Setup guide, 6-lesson course, KPIs, and agency sales scripts

Pipelines

Sales Pipeline

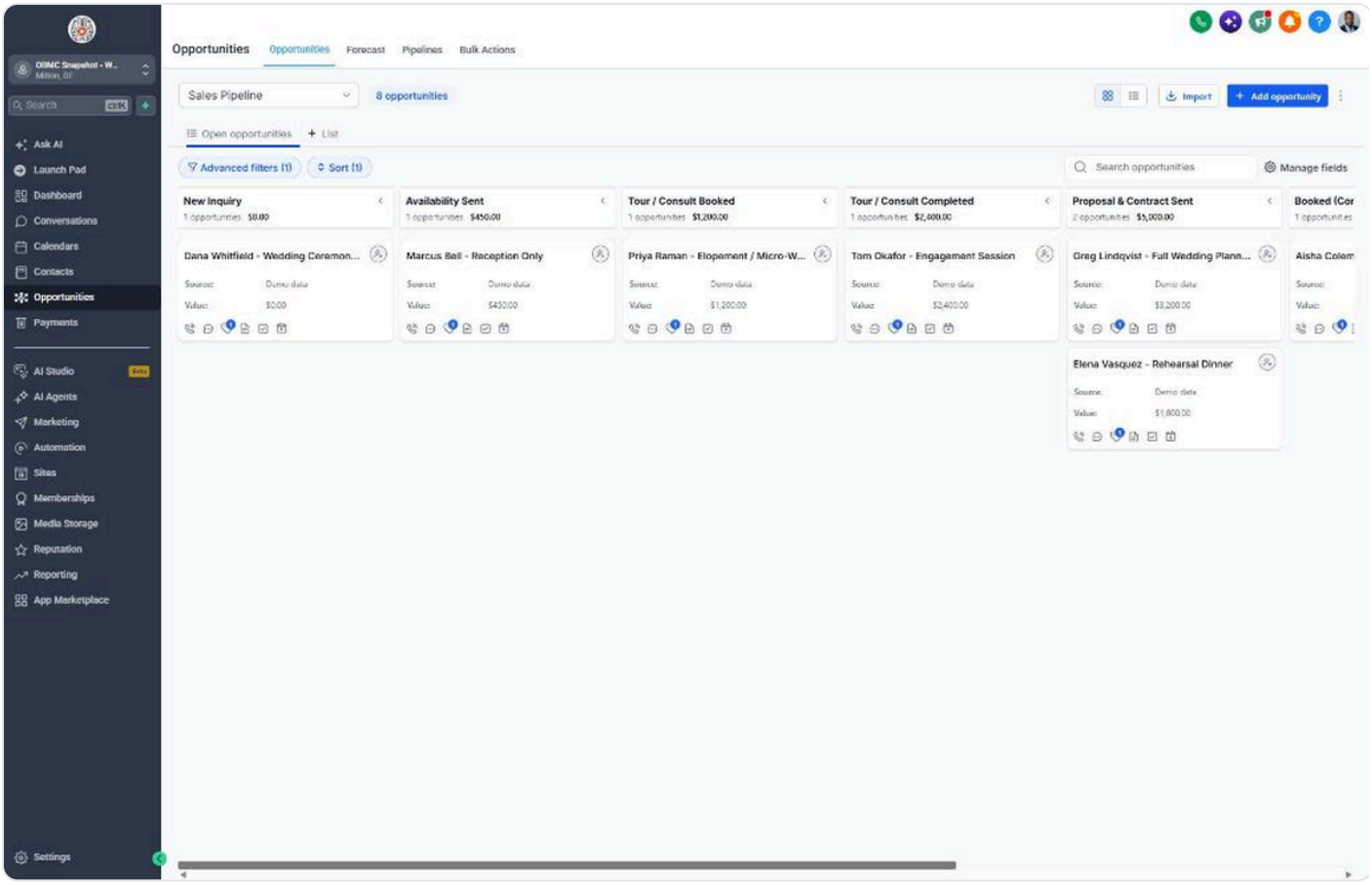
New Inquiry | Availability Sent | Tour / Consult Booked | Tour / Consult Completed | Proposal & Contract Sent | Booked (Contract + Retainer) | Booked Elsewhere / Not Moving Forward | Long-Term Nurture

Customer Journey

Planning | Final Details | Event Delivered | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
8 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Inquiry
1 opportunities $0.00
Availability Sent
1 opportunities $450.00
Tour / Consult Booked
1 opportunities $1,200.00
Tour / Consult Completed
1 opportunities $2,400.00
Proposal & Contract Sent
2 opportunities $5,000.00
Booked (Cor
1 opportunities
Dana Whitfield - Wedding Ceremon...
Source: Demo data
Value: $0.00
Marcus Bell - Reception Only
Source: Demo data
Value: $450.00
Priya Raman - Elopement / Micro-W...
Source: Demo data
Value: $1,200.00
Tom Okafor - Engagement Session
Source: Demo data
Value: $2,400.00
Greg Lindqvist - Full Wedding Plann...
Source: Demo data
Value: $3,200.00
Aisha Colem
Source:
Value:
Elena Vasquez - Rehearsal Dinner
Source: Demo data
Value: $1,800.00
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 Wedding & Events snapshot, and click Load into the business'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, address, phone, website, and time zone. Venues should use the venue address so tour confirmations are accurate.

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. Set Appointment Type to 'venue tour' or 'consultation' to match the business.

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 owner's mobile so missed-call text-back covers event days.

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 owner or sales manager so replies feel personal.

6. **Configure the tour and consultation calendar**
   Go to Calendars > Calendar Settings, open Tour & Consultation, set availability around event days, add in-person and video options, and set buffers. Copy the calendar link into the Booking Link custom value.

7. **Customize the inquiry form**
   Go to Sites > Forms > Builder and open the inquiry form. Confirm Event Date, Event Type, and Guest Count, add consent language, and embed the form on the website and Instagram link-in-bio.

8. **Connect directory and social inquiries**
   Go to Settings > Integrations to connect Facebook and Instagram so DMs land in Conversations. Route The Knot and WeddingWire lead emails into GHL with an email parser or Zapier so they trigger workflow 01.

9. **Review the pipelines and date holds**
   Go to Opportunities > Pipelines and review the booking, event journey, and reactivation pipelines. Train the team to fill in Date Hold Expires on the contact whenever a proposal includes a courtesy hold.

10 **Connect reviews and payments**
Go to Reputation > Settings to connect Google Business Profile and paste the review link into Custom Values. Go to Payments > Integrations to connect Stripe so retainers and installments trigger workflows 15 and 16.

11 **Import past couples and inquiries**
Go to Contacts > Import and upload past couples with Event Date filled in, tagged 'past-couple', and old inquiries tagged 'reactivation'. Only import contacts who agreed to hear from you.

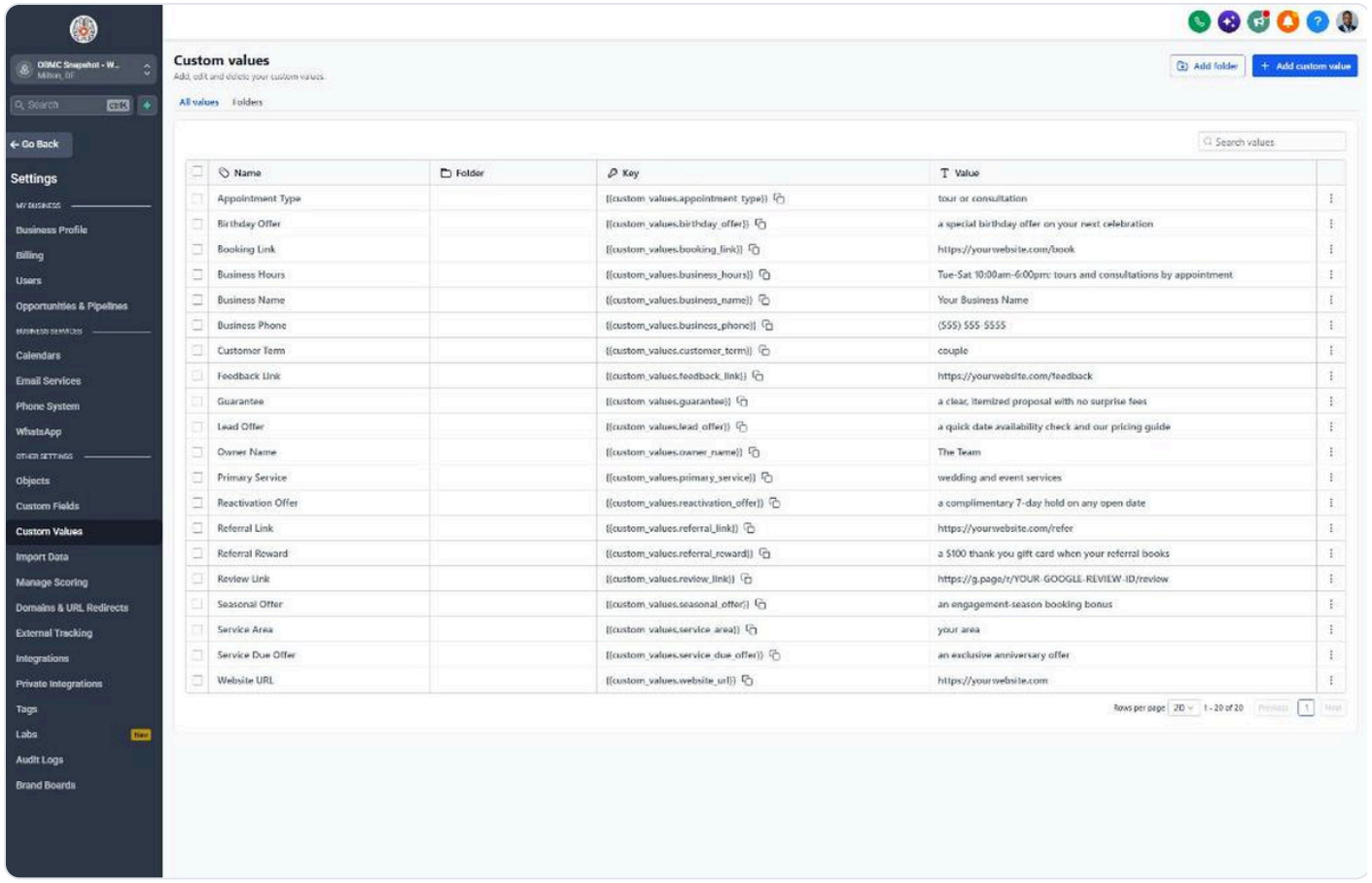
12 **Go live test**
Publish all workflows in Automation > Workflows. Submit the inquiry form with your own details, call the number and hang up, book a test tour, and set a test contact's Date Hold Expires to three days out to confirm workflow 21 fires.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Wedding & Events 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	couple
Appointment Type	tour or consultation
Primary Service	wedding and event services
Lead Offer	a quick date availability check and our pricing guide
Guarantee	a clear, itemized proposal with no surprise fees
Referral Reward	a $100 thank-you gift card when your referral books
Reactivation Offer	a complimentary 7-day hold on any open date
Seasonal Offer	an engagement-season booking bonus
Service Due Offer	an exclusive anniversary offer
Birthday Offer	a special birthday offer on your next celebration
Business Hours	Tue-Sat 10:00am-6:00pm; tours and consultations by appointment


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}}
tour or consultation
Birthday Offer
{{custom_values.birthday_offer}}
a special birthday offer on your next celebration
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Tue-Sat 10:00am-6:00pm: tours and consultations by appointment
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
couple
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
a clear, itemized proposal with no surprise fees
Lead Offer
{{custom_values.lead_offer}}
a quick date availability check and our pricing guide
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
wedding and event services
Reactivation Offer
{{custom_values.reactivation_offer}}
a complimentary 7-day hold on any open date
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a $100 thank you gift card when your referral books
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
an engagement-season booking bonus
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
an exclusive anniversary offer
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
Go Back
Settings
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** at **business name**. Thanks for your inquiry, and congratulations! I'm checking your date now. Is it set, or are you flexible on timing? 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 may be at an event! What date are you planning for? Reply here and we'll check availability right away. 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**, your **appointment type** with **business name** is confirmed for **only start date** at **start time**. We can't wait to meet you! 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 today! No worries, planning is a lot. Want to pick a new time for your tour or consultation? **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**, your proposal from **business name** is in your inbox! Take a look, and reply here with any questions. Happy to adjust anything to fit your vision.

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

> It's official, **first name**! Your date is booked with **business name**. We're so excited. Watch your email for next steps, and save this number for anything you need.

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**, it was an honor to be part of your celebration! We'd love to hear how everything felt for you. 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**, we loved being part of your day! Know a newly engaged friend or someone planning an event? We'd be honored to help them too: **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**. You asked about a date with us a while back. Still planning? We're offering **reactivation offer**. Want me to check your date? 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

Happy almost-anniversary, **first name**! It's **business name**. We'd love to help you celebrate with **service due offer**. Want the details? Reply YES. 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**. Engagement season is here, and we're offering **seasonal offer** for new bookings. Want to check your date? Reply YES. Reply STOP to opt out.

21 · Date Hold & Proposal Decision 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**. Just a heads-up that the courtesy hold on your date ends soon. Want to make it official? Sign your contract and retainer and it's yours. Questions? Reply here. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Inquiry response time	Reply to every new inquiry in under 5 minutes, including weekends	Conversations and contact timelines in Contacts
Inquiry-to-tour rate	Grow the share of inquiries that book a tour or consultation each month	Opportunities > Pipelines (Tour / Consult Booked stage)
Tour show rate	Keep no-shows low with reminders and video options	Calendars > Appointments (showed vs. no-show)
Proposal-to-booking rate	Improve the share of proposals that become signed contracts quarter over quarter	Opportunities > Pipelines (Proposal & Contract Sent vs. Booked)
Date hold conversion	Get a clear book, extend, or release decision on every courtesy hold before it expires	Contacts > Smart Lists filtered by Date Hold Expires and workflow 21 stats
Reviews and referrals	Request a review from every couple after their event and track new reviews and referrals monthly	Reputation > Overview and Opportunities filtered by referral source

Compliance notes

- Register A2P 10DLC and capture express written consent on your inquiry forms before texting. Directory leads may not include SMS consent, so start with email until the couple replies or opts in.
- Only reference date holds and deadlines that are real. Avoid fake scarcity such as 'only one Saturday left' unless it is true, to stay within FTC rules on deceptive marketing.
- Make sure contracts and proposals clearly state retainer, refund, and cancellation terms, and keep the message copy consistent with your actual policies.
- Get written permission before using couples' photos, names, or reviews in marketing, and never post fake or incentivized reviews. The FTC prohibits fake reviews and undisclosed incentives.
- Honor STOP requests immediately and respect quiet hours, especially when texting from event days or late at night.

Mini-course outline

1. **Install the Snapshot and Make It Feel Like Your Brand**: Load the snapshot and match every message to your style and services.
2. **Capture Every Inquiry and Reply First**: Get inquiries from your website, directories, and social into one fast follow-up.
3. **Book Tours and Consultations and Recover No-Shows**: Fill your calendar with prepared couples who show up.

4. **Follow Up on Every Proposal Until Booked**: Move every couple from tour to signed contract or a clear decision.
5. **Reviews, Referrals, and Reactivating Past Inquiries**: Turn delivered events into reviews and introductions and revive couples still planning.
6. **Launch Date-Hold Follow-Up and Anniversary Nurture**: Get a decision on every date hold and keep past couples coming back.

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