One Big Media Company

GOHIGHLEVEL SNAPSHOT · GYMS & FITNESS STUDIOS

Fitness 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 gyms and studios: instant lead follow-up, intro session reminders, trial-to-member conversion, retention check-ins and cancelled-member win-back.

- 21 fitness-specific workflows, from speed-to-lead to trial-to-member conversion
- Sales pipeline rebuilt for gyms: Intro Session Booked, Trial Active, Membership Offer Sent
- Member journey pipeline from onboarding to the 90-day milestone
- Reactivation pipeline for cancelled and former members
- Free Intro Session calendar with confirmation, 24-hour and 2-hour reminders
- Trial request form with fitness goal, experience level and preferred workout time
- Member feedback form that routes 4-5 star members to Google reviews
- Bring-a-friend referral form and thank-you automation
- New Year enrollment campaign you can re-run for September and spring
- Gym-specific custom fields including Membership Status, Trial Start Date and Cancellation Reason
- 20 pre-filled custom values so the whole system re-brands in minutes
- 12-step setup guide, 6-lesson install course and agency sales kit

Pipelines

Sales Pipeline

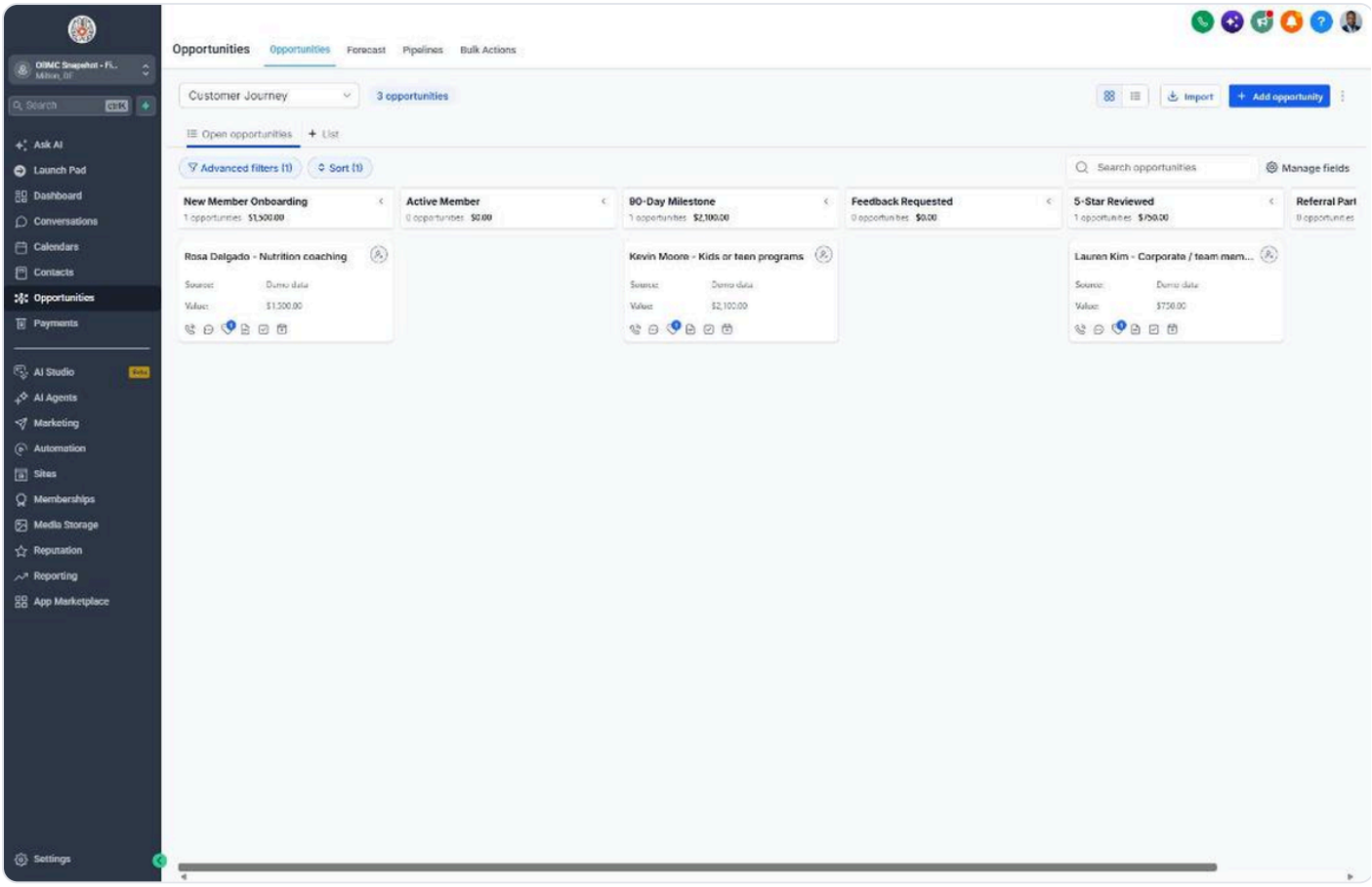
New Lead | Contacted | Intro Session Booked | Trial Active | Membership Offer Sent | Won | Lost | Long-Term Nurture

Customer Journey

New Member Onboarding | Active Member | 90-Day Milestone | 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
New Member Onboarding
1 opportunities $1,500.00
Active Member
0 opportunities $0.00
90-Day Milestone
1 opportunities $2,100.00
Feedback Requested
0 opportunities $0.00
5-Star Reviewed
1 opportunities $750.00
Referral Part
0 opportunities
Rosa Delgado - Nutrition coaching
Source: Demo data
Value: $1,500.00
Kevin Moore - Kids or teen programs
Source: Demo data
Value: $2,100.00
Lauren Kim - Corporate / team mem...
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 to import it. Go to Account Snapshots > Imported Snapshots, open the actions menu on the Fitness 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**
   In the gym's sub-account, go to Settings > Business Profile. Add the gym name, address, phone, logo and time zone so reminders go out at the right local time.

3. **Fill in custom values**
   Go to Settings > Custom Values and update the business name, owner name, phone and service area. Confirm the trial offer, comeback offer, referral reward and seasonal offer with the owner before launch.

4. **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 marketing plus customer care use case with sample messages from this snapshot.

5. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain like mail.gymname.com. Verify the DNS records so welcome and reminder emails reach the inbox.

6. **Configure the Free Intro Session calendar**
   Go to Calendars > Calendar Settings, edit Free Intro Session, assign coaches and set availability around your class schedule. Copy the booking link into the booking_link custom value.

7. **Customize and embed the forms**
   Go to Sites > Forms > Builder. Review the trial request form, adjust the service list for the gym's programs, and connect it to the website and your Facebook or Instagram lead ads.

8. **Review the pipelines**
   Go to Opportunities > Pipelines and walk through Intro Session Booked, Trial Active and Membership Offer Sent. Show staff how to move a card to Won when someone joins and to Lost when a trial ends without a join.

9. **Connect Google reviews**
   Go to Settings > Integrations and connect the gym's Google Business Profile. Confirm the review link under Reputation > Settings and paste it into the review_link custom value.

10 **Set up trial and retention tagging**
Decide how trial starts get the 'niche campaign' tag (front desk at the intro session, or Zapier from your gym software). Do the same for 'service due' every 90 days and 'start reactivation' for cancelled members.

11 **Assign alerts and publish workflows**
Go to Automation > Workflows, open each workflow, set team alerts to the manager on duty, confirm the From name and publish. Leave workflow 20 in draft until the New Year campaign window.

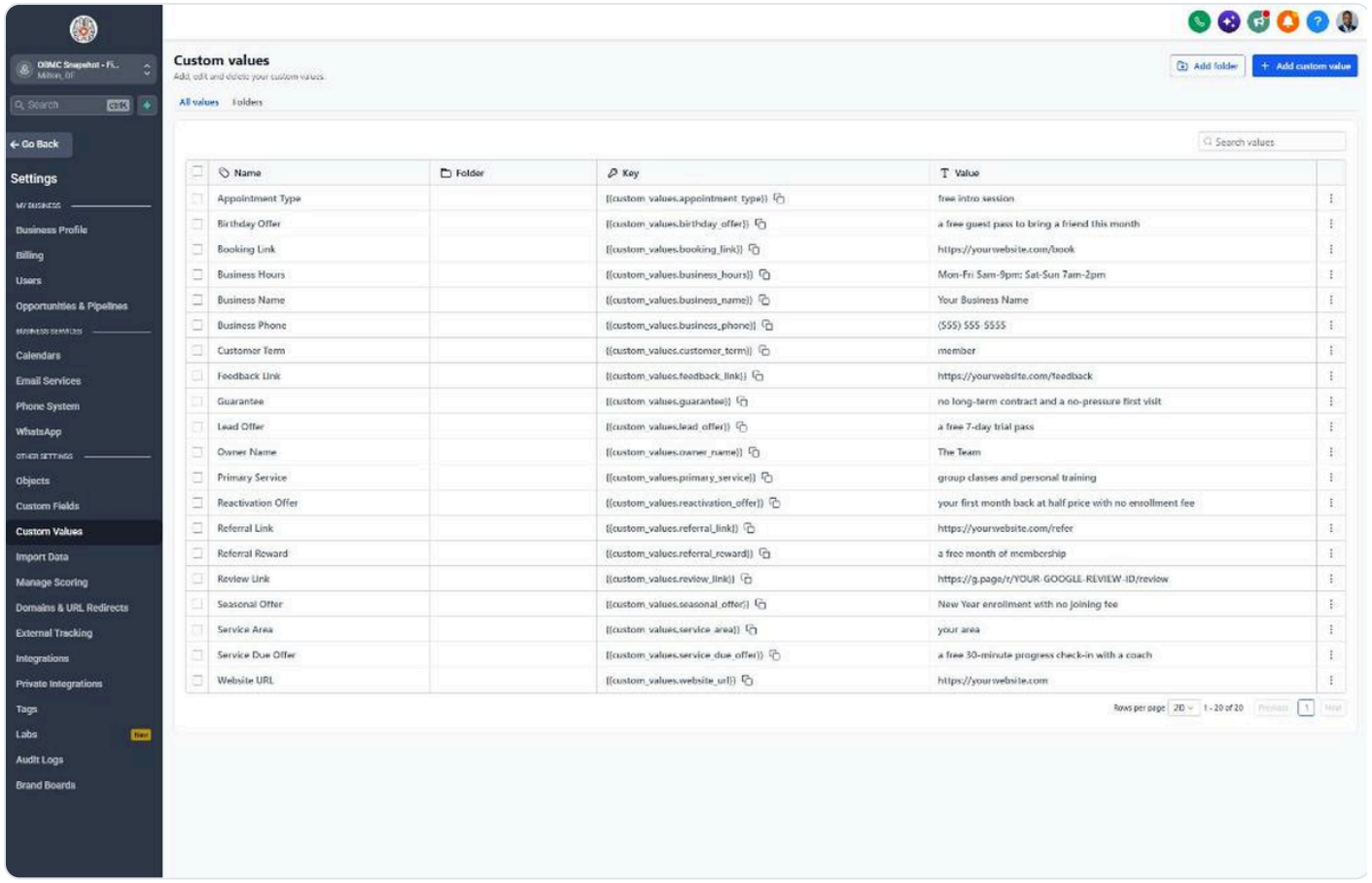
12 **Go live test**
Submit the trial form as a test contact, call the gym number and let it ring out, then book a test intro session. Check Conversations to confirm every text and email arrived and staff got the alerts, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Fitness 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	member
Appointment Type	free intro session
Primary Service	group classes and personal training
Lead Offer	a free 7-day trial pass
Guarantee	no long-term contract and a no-pressure first visit
Referral Reward	a free month of membership
Reactivation Offer	your first month back at half price with no enrollment fee
Seasonal Offer	New Year enrollment with no joining fee
Service Due Offer	a free 30-minute progress check-in with a coach
Birthday Offer	a free guest pass to bring a friend this month
Business Hours	Mon-Fri 5am-9pm; Sat-Sun 7am-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 intro session
Birthday Offer
{{custom_values.birthday_offer}}
a free guest pass to bring a friend this month
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 5am-9pm; Sat-Sun 7am-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}}
member
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
no long-term contract and a no-pressure first visit
Lead Offer
{{custom_values.lead_offer}}
a free 7-day trial pass
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
group classes and personal training
Reactivation Offer
{{custom_values.reactivation_offer}}
your first month back at half price with no enrollment fee
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a free month of membership
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
New Year enrollment with no joining fee
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free 30-minute progress check-in with a coach
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
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
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**. Your **lead offer** is ready! Pick a time for your free intro session and we'll show you around: **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, it's **business name**. Sorry we missed your call! We're probably coaching a class right now. Reply here with your question, or book a free intro session: **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** at **business name** is **start time**. Bring water and athletic shoes. 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 stress, life happens. Want to grab a new time for your free intro session? **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 the membership options from **business name**? Happy to help you pick the one that fits your schedule and budget.

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 the **business name** family, **first name**! We're pumped to have you. Save this number: it's the fastest way to reach our team.

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**, you've hit a big milestone at **business name**! How's your experience been so far? 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**, thanks for the kind words! Know someone who'd love training with us? Send them our way and you'll get **referral reward** when they join: **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**. We've missed seeing you! Any interest in getting back into a routine with us? 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**. You're due for your 90-day progress check-in! 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. Ready for a fresh start? For a limited time: **seasonal offer**. Want in? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Trial Pass → Member Conversion

TRIGGER Tag 'niche campaign' added

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

Stops when they reply

Welcome in, **first name**! Your trial at **business name** is active. Tip: book your next 2 workouts now so the week doesn't get away from you: **booking link** Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	Reply to every new trial lead within 5 minutes during staffed hours	Conversations and opportunity timelines in the Sales Pipeline
Intro session show rate	Aim for 75% or more of booked intro sessions showing up	Reporting > Appointment Report and Calendars > Appointments
Trial-to-member conversion	Track the share of Trial Active cards that reach Won and improve it every month	Opportunities > Pipelines, Trial Active vs Won
New members per month	Hit the gym's monthly new-member goal set at kickoff	Dashboard won-opportunity widget
Former-member win-backs	Bring back a steady number of former members from every reactivation send	Reactivation pipeline, Booked stage
New Google reviews	Earn several new 5-star reviews every month	Reputation > Overview

Compliance notes

- TCPA and A2P 10DLC: only text people who opted in (form consent checkbox or texted you first), keep 'Reply STOP to opt out' on first messages, and finish A2P registration before sending.
- No results claims: avoid promising weight loss, body changes or specific results in texts, emails or ads. Talk about classes, coaching, community and routine instead.
- Membership terms: many states have health club laws covering contracts, cancellation rights and auto-renewal disclosures. Make sure the gym's offers and 'no contract' language match its actual membership agreement.
- Health information: don't collect or discuss injuries or medical conditions by text. If someone mentions one, have a coach follow up by phone or in person.
- Reviews: never offer free classes or discounts in exchange for a review; the referral reward is for referrals only.

Mini-course outline

1. **Install and brand the fitness snapshot**: Get the snapshot into the gym's sub-account and branded with its name, offers and hours.
2. **Capture trial leads and reply in seconds**: Make sure every trial lead and missed call gets an instant response with the offer.
3. **Book intro sessions and cut no-shows**: Set up the intro session calendar so booked prospects actually walk in.

4. **Track trials through to membership**: Use the Sales Pipeline so every trial user gets a clear membership ask.
5. **Reviews, referrals and win-backs**: Turn happy members into reviews and referrals and bring former members back.
6. **Launch retention and optimize**: Keep members engaged and track the numbers that matter to the owner.

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