One Big Media Company

⚖️ GOHIGHLEVEL SNAPSHOT · PERSONAL INJURY LAW FIRMS

# PI Law Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

# What's inside

A complete GoHighLevel intake system for personal injury firms: instant inquiry response, free case review booking, fee agreement follow-up, and document collection that keeps cases moving.

- 21 PI-specific workflows with compliant SMS and email copy
- Intake pipeline from New Inquiry to Signed Client
- Case journey pipeline from Case Opened to Case Resolved
- Reactivation pipeline for past inquiries that never signed
- Free case review form with case type, incident date, and prior-representation questions
- Free Case Review calendar with confirmations and reminders
- Fee agreement follow-up sequence with plain-English FAQs
- New client document and records collection campaign
- Monthly case check-in workflow to keep clients informed
- Missed-call text-back for after-hours inquiries
- Review request and private service-recovery workflow
- Referral workflow written to respect bar rules on referral payments
- 'Not legal advice' and attorney advertising language built into prospect emails
- Setup guide, 6-lesson course, intake KPIs, and agency sales scripts

## Pipelines

**Sales Pipeline**

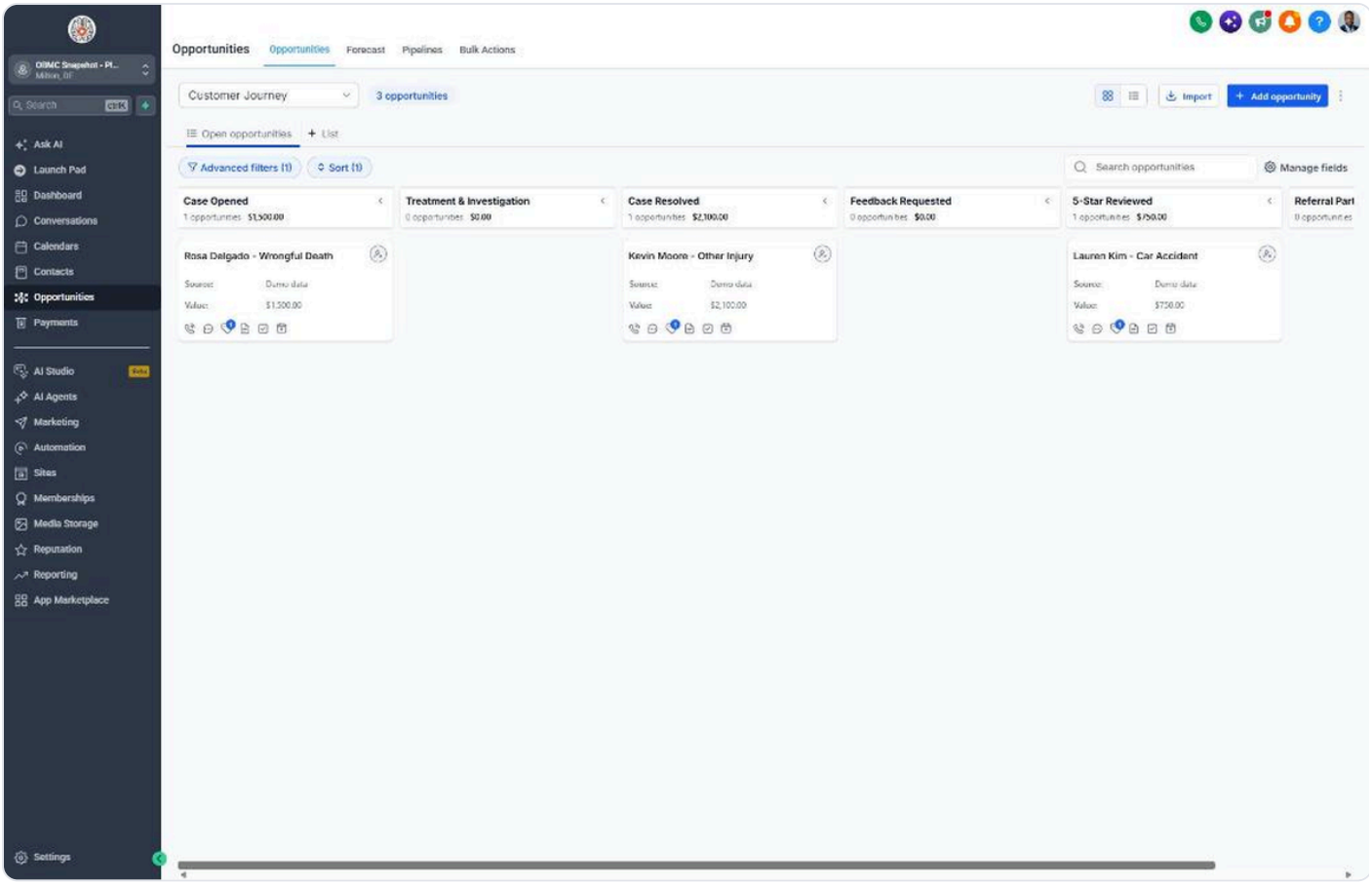
New Inquiry | Intake Contacted | Case Review Booked | Case Review Completed | Fee Agreement Sent | Signed Client | Not Signed / Declined | Long-Term Nurture

**Customer Journey**

Case Opened | Treatment & Investigation | Case Resolved | 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
Case Opened
1 opportunities $1,500.00
Treatment & Investigation
0 opportunities $0.00
Case Resolved
1 opportunities $2,100.00
Feedback Requested
0 opportunities $0.00
5-Star Reviewed
1 opportunities $750.00
Referral Part
0 opportunities
Rosa Delgado - Wrongful Death
Source: Demo data
Value: $1,500.00
Kevin Moore - Other Injury
Source: Demo data
Value: $2,100.00
Lauren Kim - Car Accident
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 PI Law snapshot, and click Load into the firm'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 firm name, office address, main phone, website, and time zone. Use the responsible attorney's name where your state requires it on advertising.

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. Edit the Guarantee value so it matches the firm's actual fee agreement language exactly.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port the intake number, then complete A2P 10DLC registration in Settings > Phone Numbers > Trust Center. Forward calls to intake or your answering service so missed-call text-back covers after-hours calls.

5. **Set up email sending**
   Go to Settings > Email Services and connect a dedicated sending domain such as mail.yourfirm.com. Add the DNS records, verify, and set the from name to the firm.

6. **Configure the case review calendar**
   Go to Calendars > Calendar Settings, open Free Case Review, assign intake staff and attorneys, and set hours, including evenings if offered. Copy the calendar link into the Booking Link custom value.

7. **Customize the case review form**
   Go to Sites > Forms > Builder and open the Request a Quote form, renamed Free Case Review. Confirm Case Type, Date of Incident, and Already Represented fields, add consent and 'no attorney-client relationship' language, then embed it on the website.

8. **Review the pipelines**
   Go to Opportunities > Pipelines and review the intake, case journey, and reactivation pipelines. Match stage names to how intake talks about cases, such as Case Review Booked and Fee Agreement Sent.

9. **Connect reviews**
   Go to Reputation > Settings and connect the firm's Google Business Profile. Paste the Google review link into the Review Link custom value so workflow 11 routes happy clients correctly.

10 **Assign intake notifications**
Go to Settings > My Staff and add intake, paralegals, and attorneys. In Automation > Workflows, set notification recipients in workflows 03, 11, 13, and 18, and assign workflow 21 tasks to the case manager.

11 **Compliance review of all copy**
Export or screenshot every message in Automation > Workflows and have the responsible attorney review it against your state's advertising rules. Add 'Attorney Advertising' labels or other required disclaimers where needed before publishing.

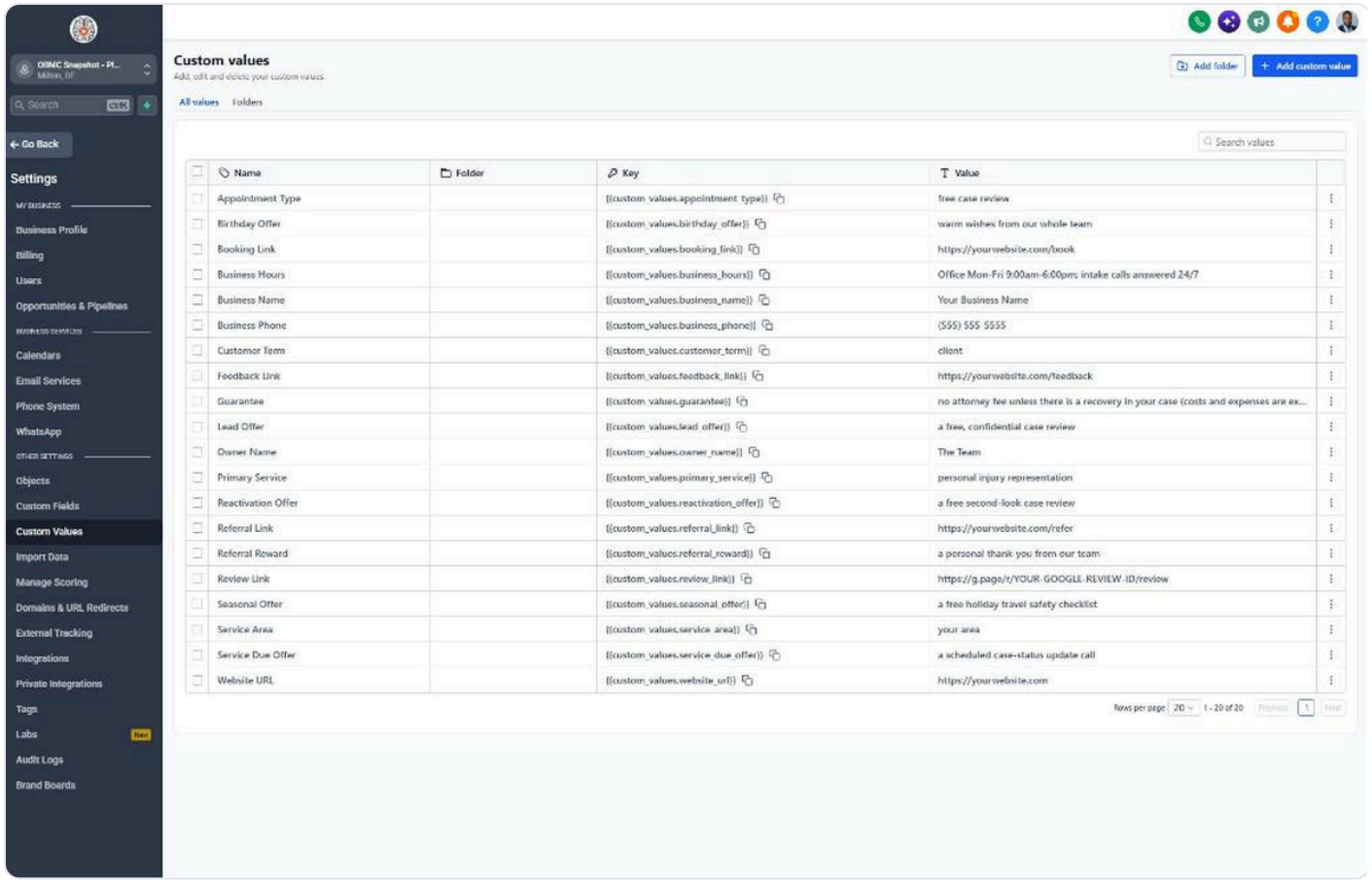
12 **Go live test**
Publish all workflows in Automation > Workflows. Submit the case review form with your own contact details, call the intake number and hang up, book a test review, and move a test opportunity to Signed Client to confirm the document collection sequence runs.

CONFIGURE

# Custom values

Settings → Custom Values. Every workflow reads from these.

| Custom value | PI Law 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 case review |
| **Primary Service** | personal injury representation |
| **Lead Offer** | a free, confidential case review |
| **Guarantee** | no attorney fee unless there is a recovery in your case (costs and expenses are explained in our fee agreement) |
| **Referral Reward** | a personal thank-you from our team |
| **Reactivation Offer** | a free second-look case review |
| **Seasonal Offer** | a free holiday travel safety checklist |
| **Service Due Offer** | a scheduled case-status update call |
| **Birthday Offer** | warm wishes from our whole team |
| **Business Hours** | Office Mon-Fri 9:00am-6:00pm; intake calls answered 24/7 |


OIIMC Snapshot - Pl...
Milton, ON
Search
ctrl K
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
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 case review
Birthday Offer
{{custom_values.birthday_offer}}
warm wishes from our whole team
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Office Mon-Fri 9:00am-6:00pm; intake calls answered 24/7
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}}
no attorney fee unless there is a recovery in your case (costs and expenses are ex...
Lead Offer
{{custom_values.lead_offer}}
a free, confidential case review
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
personal injury representation
Reactivation Offer
{{custom_values.reactivation_offer}}
a free second-look case review
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a personal thank you from our team
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a free holiday travel safety checklist
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a scheduled case-status update call
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next

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**, this is **business name**. We received your request for a free case review. Is now a good time for a quick call? Reply with a time that works and we'll reach out. 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. If you've been injured and have questions, reply with a good time to reach you and we'll call you back. If this is an emergency, please call 911. 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**. Need a different time? **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 for your free case review today. We understand recovering from an injury is a lot. Would you like to pick another 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**, your fee agreement from **business name** has been sent to your email for e-signature. Please read it carefully, and reply here with any questions. We're happy to walk through it.

**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**. Your agreement is signed and our team is opening your case. Save this number. If an insurance company contacts you, refer them to us and let us know.

**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**, now that your case is resolved, we'd value your honest feedback about working with **business name**. 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**, thank you again for trusting **business name**. If someone you care about is ever hurt in an accident, they can reach us for a free case review 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**, this is **business name**. You reached out to us a while ago about an injury. If you still have questions, we offer **reactivation offer**. Reply YES and we'll call you. 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** with your regular case check-in. Has anything changed with your treatment or work? Please don't text medical details. 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**. Holiday travel season is here. We put together **seasonal offer** with tips for the road. Want a copy? Reply YES. Reply STOP to opt out.

**21 · New Client Document & Records Collection**

**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 your case team at **business name**. To move your case forward, we need a few documents from you. Please check your email for the list. Don't text medical details; reply DOCS for a call. Reply STOP to opt out.

MEASURE

# Weekly KPIs

| Metric | Goal | Where |
|---|---|---|
| Time to first contact | Every new inquiry contacted in under 5 minutes, including nights and weekends | Conversations and Contacts > contact timeline |
| Inquiry-to-case-review rate | Grow the share of qualified inquiries that book a free case review each month | Opportunities > Pipelines (Case Review Booked stage) |
| Case review show rate | Steadily reduce no-shows with reminders and phone-review options | Calendars > Appointments (showed vs. no-show) |
| Agreement signing rate | Improve the share of sent fee agreements that are signed quarter over quarter | Opportunities > Pipelines (Fee Agreement Sent vs. Signed Client) |
| Days to complete documents | Shorten the time from signing to 'All requested' documents received | Contacts > Smart Lists filtered by Documents Received |
| Client reviews | Earn new Google reviews each month from clients with resolved cases | Reputation > Overview |

## Compliance notes

- Attorney advertising rules vary by state. Avoid outcome promises, past-result claims without required disclaimers, and 'expert' or 'specialist' language unless certified, and add 'Attorney Advertising' labels where your state requires them.
- Lawyers generally cannot pay or give anything of value for referrals (ABA Model Rule 7.2). Keep referral messages to thanks only, with no gift cards or rewards.
- Only text and email people who contacted the firm or gave express written consent. Some states restrict direct contact with accident victims for a period after the incident, so never upload purchased accident lists.
- Never request medical details, diagnoses, or records by SMS or standard email. Collect health information by phone or through a secure client portal, and protect it as confidential client information.
- Include language that a form submission or message does not create an attorney-client relationship and is not legal advice. Register A2P 10DLC with an accurate legal-services use case.

## Mini-course outline

1. **Install the Snapshot and Brand It for the Firm**: Load the snapshot and make every message match the firm's voice and fee language.
2. **Capture Inquiries and Respond First, 24/7**: Make sure every inquiry, from forms or calls, gets a response within moments.

3. **Book Free Case Reviews and Recover No-Shows**: Turn inquiries into case reviews that actually happen.
4. **Work the Intake Pipeline Through Signing**: Track every inquiry to a decision and follow up on unsigned fee agreements.
5. **Client Updates, Reviews, Referrals, and Reactivation**: Keep clients informed, earn reviews at case resolution, and re-engage past inquiries.
6. **Launch Document Collection and Optimize Intake**: Shorten time to a complete file and keep improving intake numbers.

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