One Big Media Company

GOHIGHLEVEL SNAPSHOT · MED SPAS & AESTHETICS

Med Spa Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

What's inside

A privacy-conscious GoHighLevel system for med spas that answers every inquiry, follows up on consultations, rebooks patients on schedule and grows memberships.

- 21 pre-built workflows written for med spas and aesthetics practices
- VIP membership enrollment campaign for returning patients
- Rebooking reminders by provider-recommended interval, with generic, privacy-aware wording
- Consultation follow-up sequence covering series, packages and financing questions
- Missed-call text-back for busy front desks
- Sales pipeline with Consult Booked, Consult Completed and Treatment Plan Sent stages
- Customer Journey from Treatment Scheduled to Treatment Series In Progress
- Seasonal laser hair removal campaign you can swap for other seasonal offers
- "Complimentary Consultation" calendar with 24-hour reschedule messaging
- 7 med spa custom fields including rebooking interval, membership status and photo consent
- Consultation request form that collects scheduling details only, no medical history
- Review request with private service recovery for unhappy patients
- Setup guide with HIPAA-aware notes, 6-lesson course outline and agency sales kit

Pipelines

Sales Pipeline

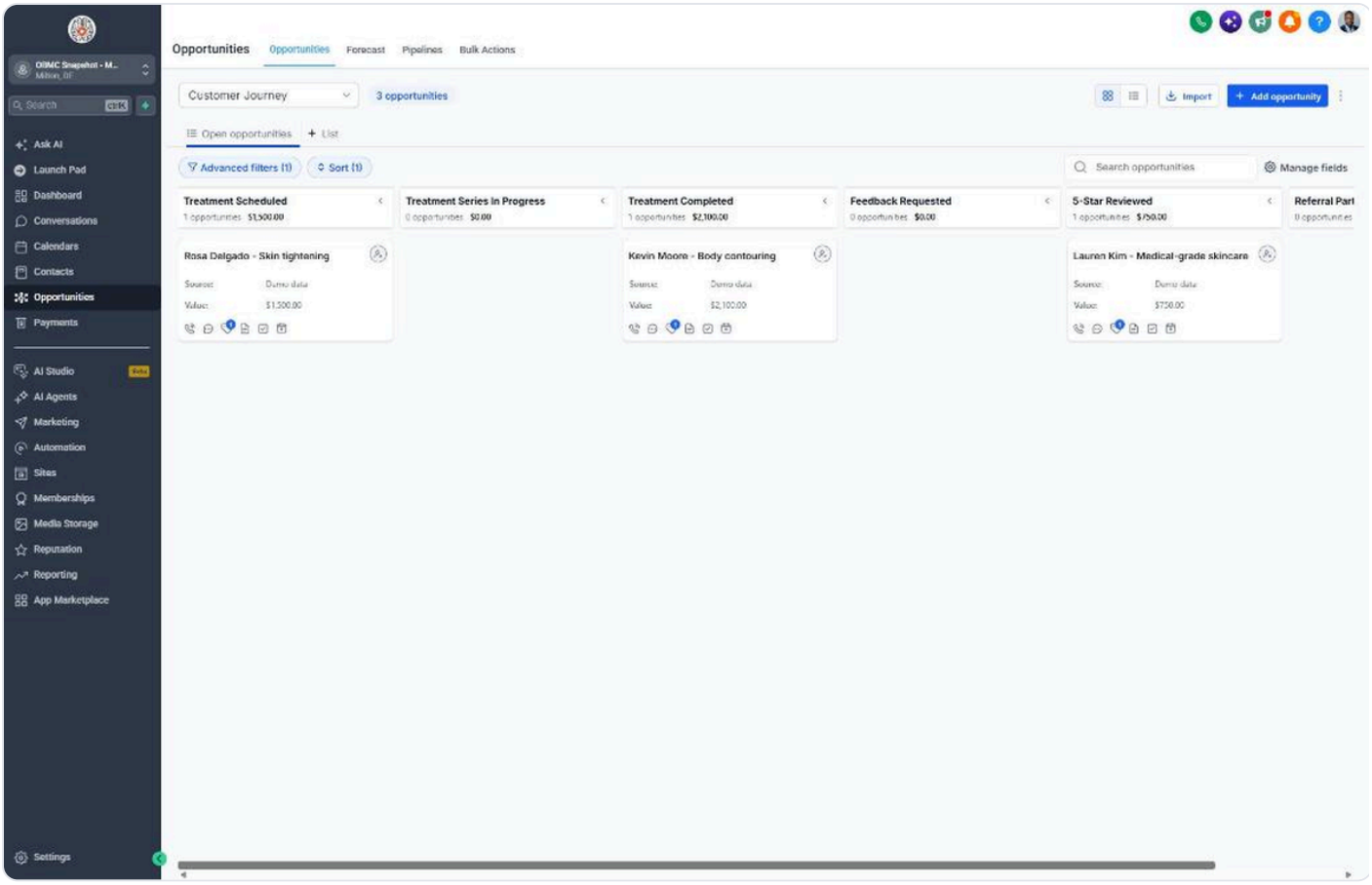
New Lead | Contacted | Consult Booked | Consult Completed | Treatment Plan Sent | Won | Lost | Long-Term Nurture

Customer Journey

Treatment Scheduled | Treatment Series In Progress | Treatment 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
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
Treatment Scheduled
1 opportunities $1,500.00
Treatment Series In Progress
0 opportunities $0.00
Treatment 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 - Skin tightening
Source: Demo data
Value: $1,500.00
Kevin Moore - Body contouring
Source: Demo data
Value: $2,100.00
Lauren Kim - Medical-grade skincare
Source: Demo data
Value: $750.00

INSTALL

12-step setup checklist

1. **Load the snapshot**
   In Agency view, go to Account Snapshots > Imported Snapshots and load the Med Spa snapshot into a new or existing sub-account. If your plan offers HIPAA features, enable them on the sub-account before importing any patients.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the practice name, address, phone, website and time zone. Messages send based on this time zone.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in Business Name, Owner Name, Business Phone, Service Area and the four links. Adjust the offers to match the practice's pricing, and have the medical director approve any offer wording.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers, buy or port a number, and complete A2P 10DLC registration in the Trust Center tab with the practice's legal name and EIN. Describe the campaign as appointment reminders, consultation follow-up and promotions.

5. **Connect email sending**
   Go to Settings > Email Services and add a dedicated sending domain, then add and verify the DNS records. This keeps confirmations and offers out of spam.

6. **Configure the consultation calendar**
   Go to Calendars > Calendar Settings and open "Complimentary Consultation." Assign providers, set availability and buffers, and add your cancellation policy to the calendar description. Copy the booking link into the Booking Link custom value.

7. **Review the pipelines**
   Go to Opportunities > Pipelines and confirm the Consult Booked, Consult Completed and Treatment Plan Sent stages. Use opportunity values for plan totals, and never type clinical notes into opportunity names.

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. When responding to reviews, never confirm someone is a patient or mention treatments.

9. **Customize and embed the consultation form**
   Go to Sites > Forms > Builder and open "01 · Request a Quote / Booking Request." Keep it to contact and scheduling questions only, add a consent-to-text checkbox, and embed it on the website.

10 **Import patients and lock down access**
Import only patients who agreed to receive texts in Contacts > Import, mapping Last Treatment Date, Rebooking Interval and Membership Status. In Settings > My Staff, limit contact access to staff who need it.

11 **Publish the workflows**
Go to Automation > Workflows, review the copy with the practice and publish. Start with 01, 02, 04, 05 and 11, then 19. Trigger Workflow 21 by tagging returning patients 'niche campaign'.

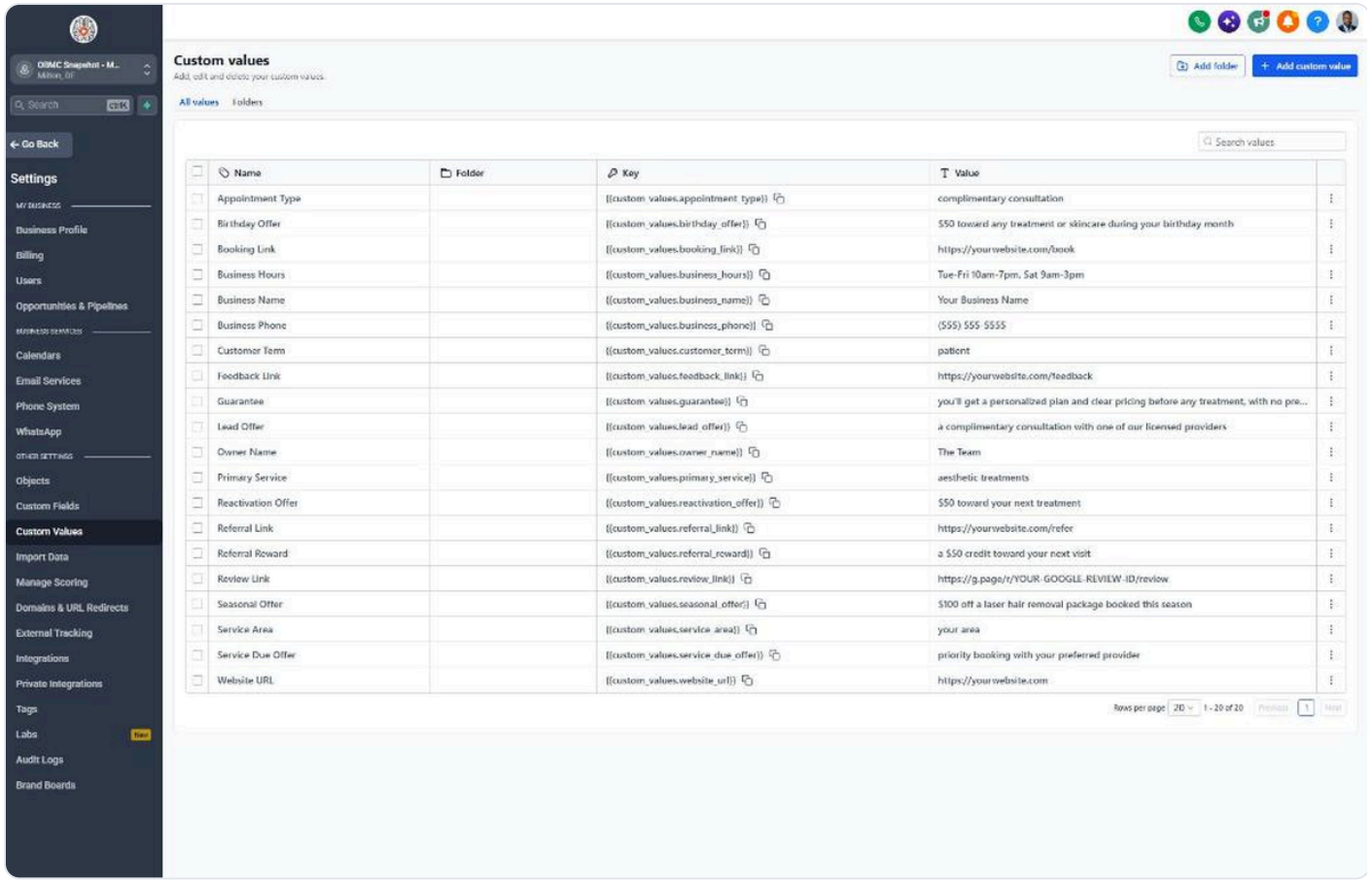
12 **Go live test**
Submit the consultation form with your own details, call the practice line and let it ring out, and book a test consultation. Confirm the texts, emails and team alerts arrive and that none include clinical details, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Med Spa 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	patient
Appointment Type	complimentary consultation
Primary Service	aesthetic treatments
Lead Offer	a complimentary consultation with one of our licensed providers
Guarantee	you'll get a personalized plan and clear pricing before any treatment, with no pressure to book
Referral Reward	a $50 credit toward your next visit
Reactivation Offer	$50 toward your next treatment
Seasonal Offer	$100 off a laser hair removal package booked this season
Service Due Offer	priority booking with your preferred provider
Birthday Offer	$50 toward any treatment or skincare during your birthday month
Business Hours	Tue-Fri 10am-7pm, Sat 9am-3pm


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}}
complimentary consultation
Birthday Offer
{{custom_values.birthday_offer}}
$50 toward any treatment or skincare during your birthday month
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Tue-Fri 10am-7pm, Sat 9am-3pm
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
patient
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
you'll get a personalized plan and clear pricing before any treatment, with no pre...
Lead Offer
{{custom_values.lead_offer}}
a complimentary consultation with one of our licensed providers
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
aesthetic treatments
Reactivation Offer
{{custom_values.reactivation_offer}}
$50 toward your next treatment
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a $50 credit toward your next visit
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
$100 off a laser hair removal package booked this season
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
priority booking with your preferred provider
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 **business name**. Thanks for reaching out! We'd love to set you up with **lead offer**. Book a time here: **booking link** or reply with a good time to call. 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 with a patient. How can we help? Reply here or book a consultation: **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 confirmed, **first name**! Your visit 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**, we missed you today at **business name**. We hope everything's okay! Would you like 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 review the plan we sent from **business name**? Happy to answer questions by phone. Just reply with a good time to call.

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 see you. Our team will confirm your appointment details shortly. Save this number for scheduling 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**, thank you for visiting **business name**! How was your experience with our team? It takes 20 seconds: **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**, thank you for the kind words! If a friend has been curious about visiting us, 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 **business name**. It's been a while and we'd love to see you again. Would you like us to send a few open times? 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**. Based on your last visit, it's about time to schedule your next appointment. Book now for **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. For a limited time: **seasonal offer**. Want details? Reply YES or book a consult: **booking link** Reply STOP to opt out.

21 · VIP Membership Enrollment

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**, as one of our valued patients, you're invited to join the **business name** membership: member pricing, a monthly credit toward visits and skincare, and priority booking. Want details? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	Aim to respond to every consultation inquiry within 5 minutes during business hours	Conversations and contact activity
Consult show rate	Aim to improve show rates month over month with reminders	Calendars > appointment list and Workflow 05 stats
Consult-to-treatment conversion	Track monthly and aim to improve it each quarter	Opportunities > Sales Pipeline, Consult Completed to Won
On-time rebooking	Aim to rebook most patients within their recommended interval	Automation > Workflows > 19 stats and Contacts filtered by Next Service Due
Active members	Grow active memberships every month	Contacts filtered by Membership Status = Active member
Google reviews	Aim for steady new reviews each week	Reputation > Overview

Compliance notes

- HIPAA: ask whether your GHL plan offers HIPAA features and a Business Associate Agreement, and enable them before storing patient information. Keep clinical notes, health history and treatment details out of GHL fields, SMS and email.
- Never ask for or discuss medical details by text. Keep reminders generic ('your next visit') and move medical questions to a phone call or secure patient portal.
- Before-and-after photos and testimonials need the patient's separate written authorization for marketing use, and must reflect typical experiences under FTC rules. Track permission in the Photo Consent on File field.
- Avoid outcome claims ('erase wrinkles', 'permanent results') and follow your state medical board's advertising and supervision rules. Some states restrict referral rewards and discounts tied to medical services, so review W12 and W17 offers locally.
- Register A2P 10DLC and get prior express written consent before sending marketing texts under the TCPA. Honor STOP replies immediately.

Mini-course outline

1. **Install the Snapshot and Brand It for Your Practice**: Load the snapshot, enable privacy settings and make every message sound like the practice.
2. **Respond to Every Consultation Inquiry Fast**: Make sure every inquiry and missed call gets a prompt, privacy-conscious reply.

3. **Book Consultations and Reduce No-Shows**: Fill provider calendars and make sure patients show up.
4. **Follow Up on Every Treatment Plan**: Move every consultation to a decision without pressure.
5. **Reviews, Referrals and Welcoming Patients Back**: Grow reviews and referrals and bring lapsed patients back.
6. **Launch Rebooking Intervals and Memberships**: Keep patients rebooking on schedule and grow your membership base.

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