One Big Media Company

GOHIGHLEVEL SNAPSHOT · PEST CONTROL

Pest Control Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

What's inside

A ready-to-launch GoHighLevel system for pest control companies: instant lead response, inspection booking, quote follow-up, reviews, service reminders and a seasonal pest pressure campaign.

- 21 pre-built workflows written for pest control companies
- Seasonal Pest Pressure Alert campaign for each season change
- Sales pipeline with Inspection Booked, Inspection Completed and Quote Sent stages
- Customer Journey pipeline from Initial Service Scheduled to Referral Partner
- Free Pest Inspection calendar with tech-on-the-way style reminders
- Quote form with Pest Type, Infestation Severity and Property Type questions
- Pest control custom fields: pest type, severity, plan status, property type, last service date, termite inspection date, pets or kids
- Quarterly service due reminders that reduce skipped visits
- Mosquito season promotion, easy to clone for fall rodents
- Win-back campaign for canceled service plans
- Review flow that sends happy customers to Google and routes unhappy ones to the owner
- Refer-a-neighbor flow with a free-month reward
- Setup guide and 6-lesson course outline

Pipelines

Sales Pipeline

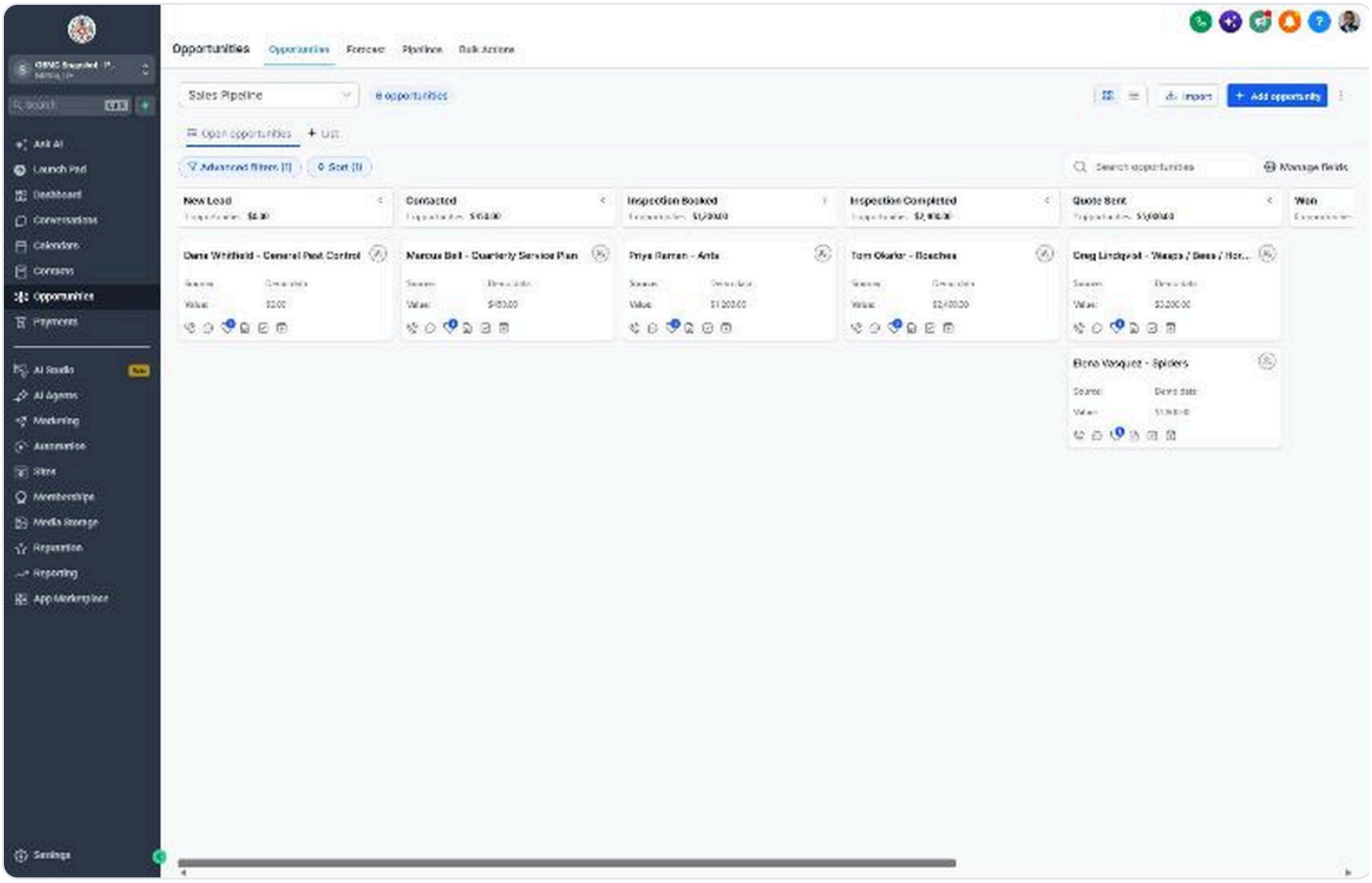
New Lead | Contacted | Inspection Booked | Inspection Completed | Quote Sent | Won | Lost | Long-Term Nurture

Customer Journey

Initial Service Scheduled | Initial Service In Progress | Initial Service Completed | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipeline
Bulk Actions
Sales Pipeline
8 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
Contacted
Inspection Booked
Inspection Completed
Quote Sent
Won
Dana Whitfield - General Pest Control
Marcus Bell - Quarterly Service Plan
Priya Raman - Ants
Tom Okafor - Roaches
Greg Lindquist - Wasps / Bees / Hor...
Elena Vasquez - Spiders
Ant 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**
   From the agency view, go to Sub-Accounts, open the account menu and choose Load Snapshot, or select this snapshot when creating the sub-account. Import all assets and switch into the account.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the business name, address, phone, website, pest control license number if you display it, and time zone.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in business name, owner name, phone, service area and the booking, review, feedback and referral links. Set the guarantee, seasonal and reactivation offers to match what the company actually honors.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number and enable missed-call text-back. Complete A2P 10DLC registration in the Trust Center before sending any campaign.

5. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain. Add the DNS records and verify it so service reminders land in the inbox.

6. **Configure the Free Pest Inspection calendar**
   Go to Calendars > Calendar Settings and open Free Pest Inspection. Assign technicians or an inspector, set availability by route day if needed, then copy the booking link into the booking_link custom value.

7. **Customize the quote form**
   Go to Sites > Forms > Builder and open Request a Quote / Booking Request. Confirm Pest Type, Infestation Severity and Property Type, add the SMS consent checkbox, and embed it on the website.

8. **Connect Google Business Profile and reviews**
   Go to Settings > Integrations and connect Google Business Profile. Then go to Reputation > Settings, copy the review link and paste it into the review_link custom value.

9. **Import customers with plan status**
   Go to Contacts > Import and upload active, one-time and canceled customers with consent status, Service Plan Status and Last Service Date. This feeds workflows 14, 19 and 21 and keeps active members out of win-back offers.

10 **Assign staff and alerts**
Go to Settings > My Staff and add office staff, technicians and the owner with mobile numbers. Update the alert steps in workflows 01, 02, 03 and 13 under Automation > Workflows.

11 **Publish the workflows**
Go to Automation > Workflows, review each workflow's copy, and switch it from Draft to Publish. Keep 14, 20 and 21 in draft until you're ready to launch each campaign.

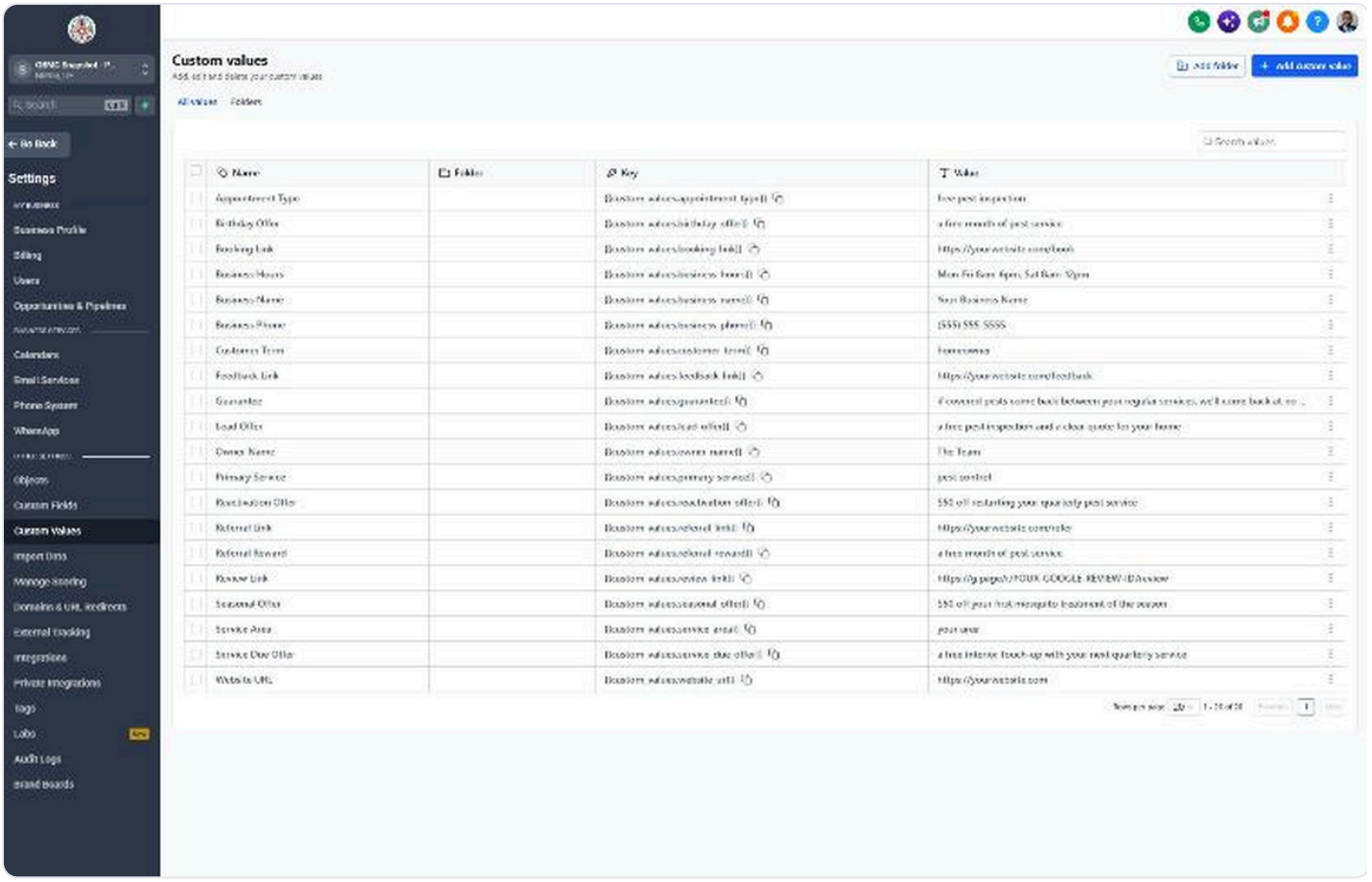
12 **Go live test**
Submit the form, book an inspection, call and hang up, and reply to a text. Confirm every SMS, email and team alert fires, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Pest Control 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	homeowner
Appointment Type	free pest inspection
Primary Service	pest control
Lead Offer	a free pest inspection and a clear quote for your home
Guarantee	if covered pests come back between your regular services, we'll come back at no extra charge
Referral Reward	a free month of pest service
Reactivation Offer	$50 off restarting your quarterly pest service
Seasonal Offer	$50 off your first mosquito treatment of the season
Service Due Offer	a free interior touch-up with your next quarterly service
Birthday Offer	a free month of pest service
Business Hours	Mon-Fri 8am-6pm, Sat 8am-12pm


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
Birthday Offer
Booking Link
Business Hours
Business Name
Business Phone
Customer Term
Feedback Link
Guarantee
Lead Offer
Owner Name
Primary Service
Reactivation Offer
Referral Link
Referral Reward
Review Link
Seasonal Offer
Service Area
Service Due Offer
Website URL
Settings
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
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** with **business name**. Got your request. What pests are you seeing, and where? I can get you **lead offer**. Pick a time here: **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, this is **business name**. Sorry we missed your call, our techs are out on routes. What pest are you dealing with? Reply here and we'll get right back to you. 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 free pest inspection with **business name** is set for **start time**. We'll text when your tech is on the way. Reschedule: **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**, sorry we missed you today for your pest inspection. No worries. We can often inspect the outside while you're away. Want 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 look over your pest control quote from **business name**? Happy to explain the service plan or answer questions by phone.

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**! Thanks for trusting us to protect your home. We'll confirm your first service date shortly. Save this number, it's our direct line.

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**, thanks for choosing **business name**! How did your technician do? It takes 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 again for the kind words! Know a neighbor dealing with pests? Send them our way and we'll thank you with **referral reward**: **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 treated your home a while back. Have the pests stayed away, or are you seeing anything new? 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**. Your next pest service is due. 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. Mosquito season is starting in **service area**. For a limited time: **seasonal offer**. Want a spot? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Seasonal Pest Pressure Alert

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 **business name**. Our techs are seeing more pest activity across **service area** as the season changes. Want us to inspect and protect your home before they move in? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	First contact within 5 minutes of every new lead	Conversations and the contact activity timeline in Contacts
Lead to inspection rate	Steadily increase the share of leads that book an inspection	Opportunities > Pipelines > Sales Pipeline (New Lead vs Inspection Booked)
Plan conversion rate	Grow the share of new customers who start a recurring plan instead of a one-time treatment	Contacts filtered by Service Plan Status, and Opportunities > Pipelines (Quote Sent vs Won)
Skipped or overdue services	Keep overdue scheduled services close to zero	Automation > Workflows > 19 Service Due stats and Contacts filtered by Last Service Date
Win-backs	Restart canceled plans every season	Opportunities > Reactivation pipeline (Booked stage)
New Google reviews	Ask after every initial service and grow reviews every week	Reputation > Overview

Compliance notes

- Don't describe pesticides or treatments as 'safe', 'non-toxic', 'harmless' or 'all natural' without qualification. The EPA and state lead agencies restrict these claims for pest control products.
- Follow your state's structural pest control rules on licensing, advertising your license number, and required paperwork for termite and wood-destroying insect inspections.
- Collect SMS consent on every form and booking page, and register A2P 10DLC with accurate descriptions of service reminders and seasonal campaigns.
- Put service plan terms, automatic renewal and cancellation policies in writing, and follow your state's automatic renewal laws for recurring billing.
- Don't ask for health details by text. If a customer mentions allergies, pregnancy or sensitive household members, move the conversation to a phone call with a licensed technician.

Mini-course outline

1. **Install the snapshot and brand it for a pest control company**: Load the snapshot and make every message sound like the pest control company.
2. **Lead capture and speed-to-lead**: Reply to every pest lead and missed call while techs are on routes.
3. **Inspection booking and no-show recovery**: Fill inspection slots along the route and recover no-shows.

4. **Quotes and selling the service plan**: Follow up on every quote and convert one-time buyers into recurring plans.
5. **Reviews, referrals and win-backs**: Turn services into reviews and referrals, and bring canceled customers back.
6. **Launch and run the seasonal pest playbook**: Go live and launch the Seasonal Pest Pressure Alert at every season change.

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