One Big Media Company

🏠 GOHIGHLEVEL SNAPSHOT · REAL ESTATE AGENTS

Real Estate 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 real estate agents: instant buyer and seller follow-up, home value request conversion, consultation reminders, sphere nurture and home anniversaries.

- 21 real-estate-specific workflows, from speed-to-lead to home value request conversion
- Sales pipeline built for agents: Consultation Booked, Consultation Completed, Listing Proposal / Buyer Plan Sent
- Client journey pipeline from Agreement Signed through Closed
- Reactivation pipeline for old leads and your sphere
- Buyer & Seller Consultation calendar with confirmation, 24-hour and 2-hour reminders
- Lead form that captures buyer or seller, price range and pre-approval status
- Post-closing feedback form that routes happy clients to Google reviews
- Refer-a-friend form and referral thank-you automation
- Home anniversary workflow with an annual home value update
- Spring seller campaign with a market report offer
- Agent-specific custom fields including Lead Type, Property Address and Closing Date
- 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

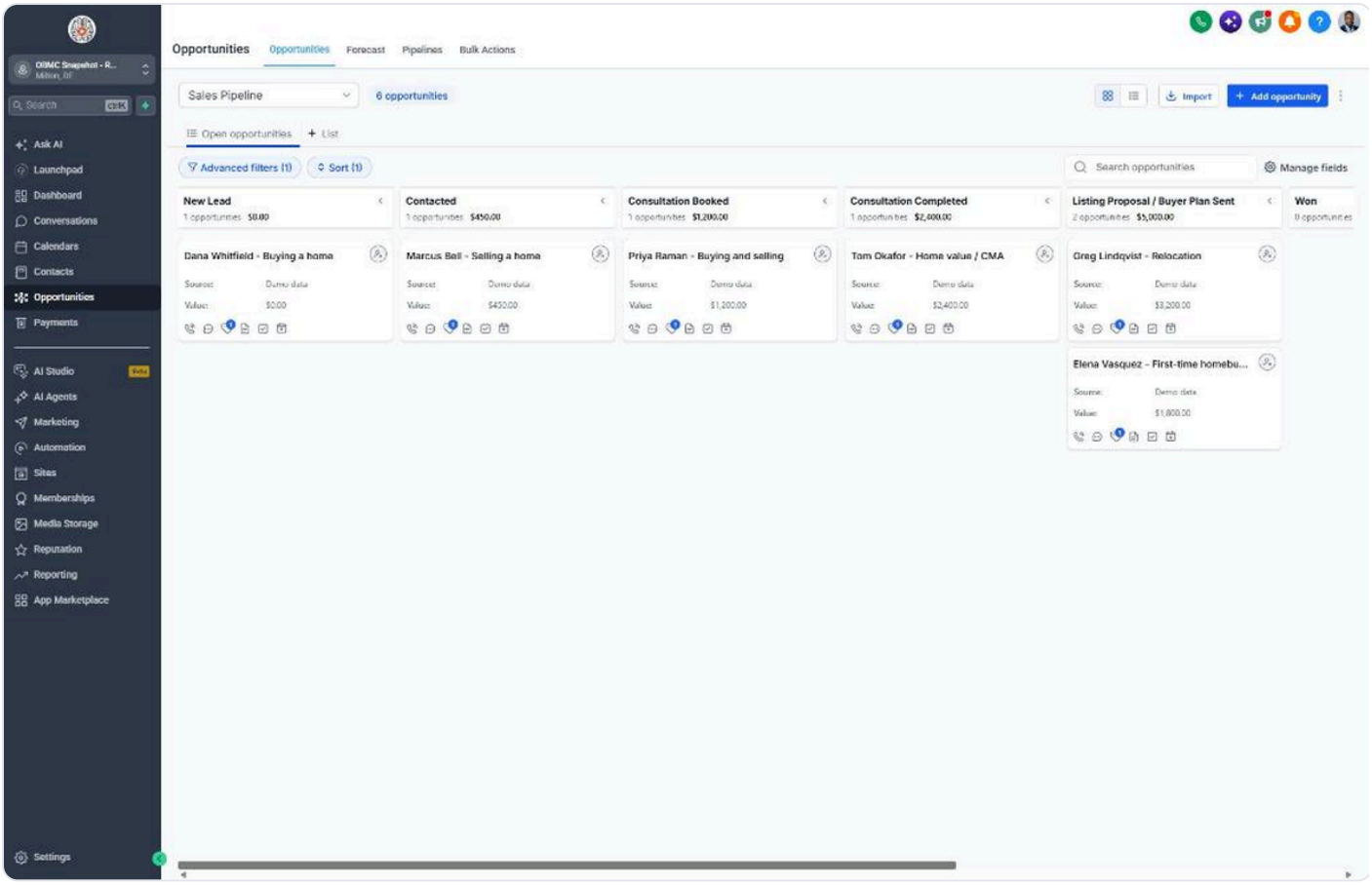
New Lead | Contacted | Consultation Booked | Consultation Completed | Listing Proposal / Buyer Plan Sent | Won | Lost | Long-Term Nurture

Customer Journey

Agreement Signed | Active / Under Contract | Closed | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
6 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
1 opportunities $0.00
Contacted
1 opportunities $450.00
Consultation Booked
1 opportunities $1,200.00
Consultation Completed
1 opportunities $2,400.00
Listing Proposal / Buyer Plan Sent
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - Buying a home
Source: Demo data
Value: $0.00
Marcus Bell - Selling a home
Source: Demo data
Value: $450.00
Priya Raman - Buying and selling
Source: Demo data
Value: $1,200.00
Tom Okafor - Home value / CMA
Source: Demo data
Value: $2,400.00
Greg Lindqvist - Relocation
Source: Demo data
Value: $3,200.00
Elena Vasquez - First-time homebu...
Source: Demo data
Value: $1,800.00
Ask AI
Launchpad
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 Real Estate snapshot and choose Push to Sub-Account, or pick it when creating a sub-account under Sub-Accounts > Create Sub-Account.

2. **Complete the business profile**
   In the agent's sub-account, go to Settings > Business Profile. Add the agent or team name, brokerage, address, phone, logo and time zone.

3. **Fill in custom values**
   Go to Settings > Custom Values and update the business name, the agent's name as owner, phone and service area. Confirm the lead offer, referral reward and seasonal offer comply with the agent's state rules and brokerage policy.

4. **Add brokerage disclosures**
   Most states require the brokerage name on all advertising. Add the brokerage name, license number and Equal Housing Opportunity statement to the email signature under Settings > My Profile or the user's signature settings.

5. **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.

6. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain such as mail.agentname.com. Verify the DNS records so emails reach the inbox.

7. **Configure the consultation calendar**
   Go to Calendars > Calendar Settings, edit Buyer & Seller Consultation, set availability around showings and add video meeting options. Copy the booking link into the booking_link custom value.

8. **Customize the forms and route portal leads**
   Go to Sites > Forms > Builder to review the lead form, then embed it on the website. Route Zillow, Realtor.com and other portal leads into GHL with Zapier or email parsing so they trigger workflow 01.

9. **Review the pipelines**
   Go to Opportunities > Pipelines and walk through Consultation Booked, Consultation Completed and Listing Proposal / Buyer Plan Sent. Move cards to Won when the listing or buyer agreement is signed.

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

11 **Set up home value and anniversary triggers**
Make sure home valuation requests get tagged 'niche campaign' (from the valuation form or a lead-source rule). Import past clients with their Closing Date and build an annual trigger that tags them 'service due' on their home anniversary.

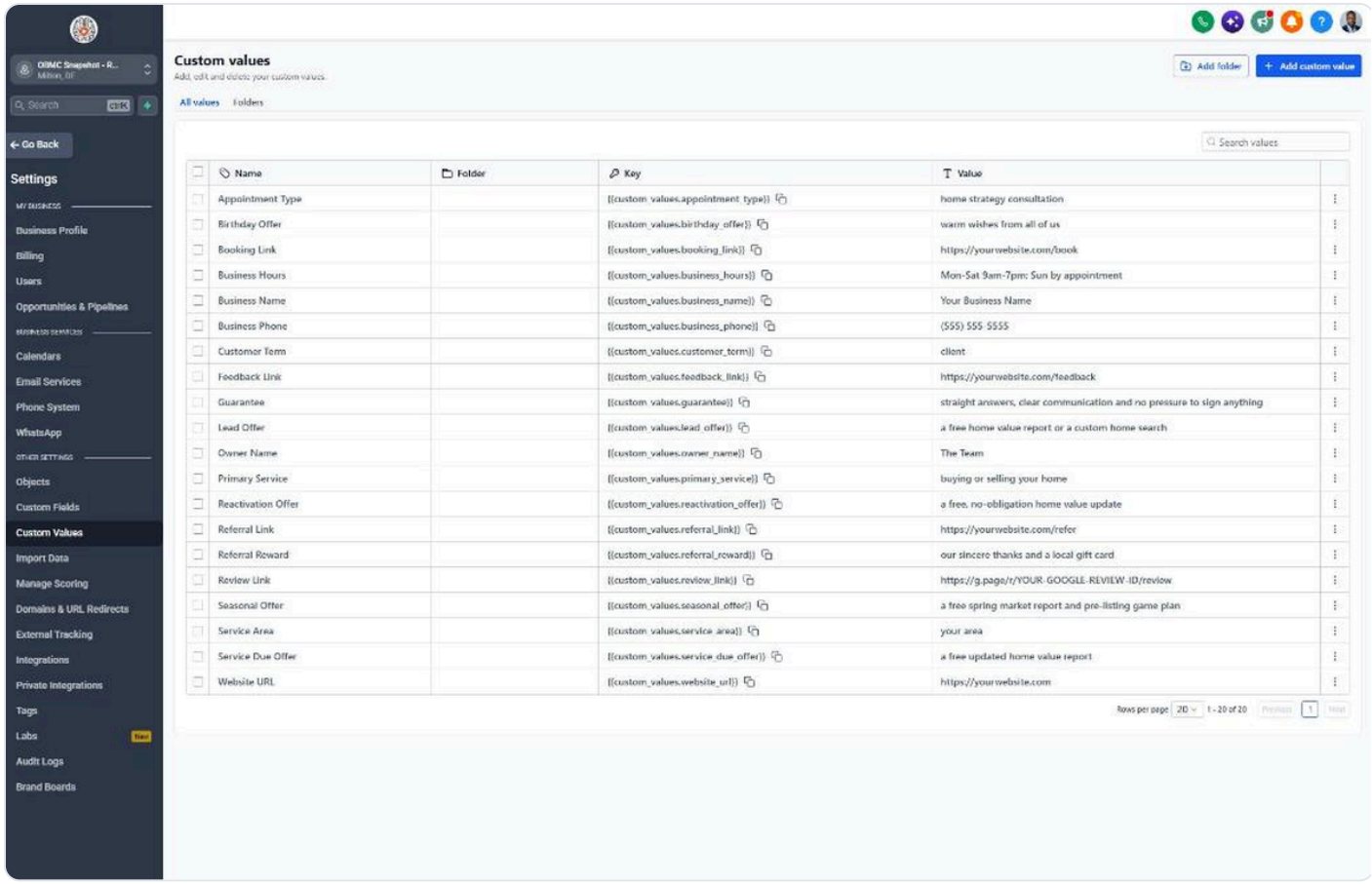
12 **Go live test**
Publish all workflows under Automation > Workflows, then submit the form as a test lead, call the number and let it ring out, and book a test consultation. Check Conversations for every message and confirm alerts reached the agent, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Real Estate 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	home strategy consultation
Primary Service	buying or selling your home
Lead Offer	a free home value report or a custom home search
Guarantee	straight answers, clear communication and no pressure to sign anything
Referral Reward	our sincere thanks and a local gift card
Reactivation Offer	a free, no-obligation home value update
Seasonal Offer	a free spring market report and pre-listing game plan
Service Due Offer	a free updated home value report
Birthday Offer	warm wishes from all of us
Business Hours	Mon-Sat 9am-7pm; Sun 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}}
home strategy consultation
Birthday Offer
{{custom_values.birthday_offer}}
warm wishes from all of us
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Sat 9am-7pm; Sun 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}}
client
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
straight answers, clear communication and no pressure to sign anything
Lead Offer
{{custom_values.lead_offer}}
a free home value report or a custom home search
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
buying or selling your home
Reactivation Offer
{{custom_values.reactivation_offer}}
a free, no-obligation home value update
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
our sincere thanks and a local gift card
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a free spring market report and pre-listing game plan
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free updated home value report
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
Go Back
Search
ctrlK

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**. Thanks for reaching out! Are you thinking about buying, selling or both? Reply here, or grab a time to talk: **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 **owner name** with **business name**. Sorry I missed your call, I'm likely at a showing. How can I help? Reply here or book a time to talk: **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** with **business name** is **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**, sorry we didn't connect today! No worries, schedules get crazy. Want to pick a new time to talk about your plans? **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 the plan I sent? Happy to walk you through any part of it, from pricing to timing.

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 aboard, **first name**! I'm excited to work with you. Save this number, it's my direct line for anything you need along the way. - **owner name**

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

> Congratulations on closing, **first name**! It was a pleasure working with you. How did I do? 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**, thank you for the kind words! If you know anyone thinking about buying or selling, I'd be honored to help them too. Here's an easy way to introduce us: **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** with **business name**. Quick question: are you still thinking about making a move this year? 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**, happy home anniversary from **business name**! Curious what your home is worth now? 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**, **owner name** here. Thinking about selling this spring? I'm offering **seasonal offer**. Want one? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Home Value Request → Seller Conversion

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** with **business name**. Got your home value request! I'm preparing a custom report from recent nearby sales. Any upgrades I should know about? Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	Reply to every new lead within 5 minutes, including evenings and weekends	Conversations and opportunity timelines in the Sales Pipeline
Lead-to-appointment rate	Grow the share of new leads that book a consultation every quarter	Opportunities > Pipelines, New Lead vs Consultation Booked
Home value requests to listing appointments	Turn a steady share of valuation requests into in-person walkthroughs	Automation > Workflows > 21 > Execution Logs and the Sales Pipeline
Agreements signed	Hit the monthly goal for signed listing and buyer agreements	Opportunities > Pipelines, Won stage and the Dashboard
Sphere conversations	Start new conversations with past clients and old leads every month	Reactivation pipeline and Conversations
New Google reviews	Ask every closed client and earn new reviews every month	Reputation > Overview

Compliance notes

- Fair Housing: never describe neighborhoods, schools or 'ideal' buyers in ways that could steer by race, religion, national origin, sex, disability, familial status or other protected classes. Keep copy about the property, market and process.
- Brokerage advertising rules: most states require the brokerage name and often license details on emails, texts and ads. Add them to the signature and landing pages.
- Referral rewards: many states restrict giving gifts or compensation to unlicensed people for referrals. Confirm with the broker that the Referral Reward is allowed, or change it to a simple thank-you.
- TCPA and A2P 10DLC: only text leads who gave consent on your form or texted you first, keep 'Reply STOP to opt out' on first messages, and register A2P before sending. Purchased lead lists usually lack valid consent.
- Value reports: present home value reports as estimates or opinions of value, not appraisals, and don't promise a sale price or time on market.

Mini-course outline

1. **Install and brand the real estate snapshot**: Get the snapshot into the agent's sub-account and branded with their name, brokerage and market.
2. **Capture buyer and seller leads instantly**: Make sure every web, portal and missed-call lead gets an instant, personal response.

3. **Book consultations and cut no-shows**: Set up the consultation calendar so booked leads actually show up.
4. **From consultation to signed agreement**: Use the Sales Pipeline to move every lead from consultation to a signed listing or buyer agreement.
5. **Reviews, referrals and your sphere**: Turn closings into reviews and referrals and restart conversations with old leads and past clients.
6. **Launch seller conversion and home anniversaries**: Go live with the home value request sequence and annual nurture, then track what produces listings.

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