SGS AI System Snapshot

Standard Operating Procedure

GoHighLevel StartGrowSell.AI 6h 24m Training

1 Snapshot Selection

You have **two snapshots**. Use only ONE per client based on their industry.

Snapshot A: Business Booking

Customer comes INTO the facility

Gym, fitness studio, chiropractor, dentist, orthodontics, med spa, private tutoring, hair salon, nail salon, physical therapist, etc.

Messaging: "come by," "come in," "visit us"

Snapshot B: At-Home Booking

Service done at the customer's home

Pest control, roofing, HVAC, solar, landscaping, pool cleaning, plumbing, electrical, carpet cleaning, window cleaning, handyman, gutter cleaning, home cleaning, etc.

Messaging: "come out to your home," "headed your way"

IMPORTANT

Do NOT add a phone appointment step before the in-person/home visit. Testing shows it adds friction, increases drop-off, and hurts booking & show rates. Book directly to the appointment.

2 System Architecture Overview

Four Campaign Categories

CAMPAIGN	SOURCE	TAG	DASHBOARD SECTION
Paid Ads (FB/IG)	Lead forms or conversion ads	`new ad lead`	Marketing Results
Reactivation	Past customers / unconverted leads	`new reactivation lead`	Reactivation Results
Reviews & Referrals	Post-appointment + active customers	`referral`	Google Reviews / Referrals
Website Leads	Website contact forms	`web lead`	Website Leads

Workflow Flow Per Campaign

```
Lead enters ——> Nurture sequence (book appt) ——> Confirmation ——> Reminders (48h, 24h,
     |                                                                  |
     v                                                        Appointment Status ("The
If no book ——> Follow-up msgs                                          |
  (day-by-day cadence)                                                 |
                                                        ┌───────────────┼──────────────
                                                        v               v
                                                     Cancel        No-Show         Showed
                                                        |               |
                                                   Reschedule     Reschedule      Google
                                                     Nurture        Nurture       ——> Re
```

The Dashboard

Five sections tracking full funnel per campaign:

Leads → Scheduled → Unmarked → Canceled → No-Show → Showed → Sold → Total Contract Value

3 Importing & Creating Your Master Snapshot

1

Import the Snapshot

Agency View > Account Snapshots > Imported Snapshots → Paste snapshot link → Click **Import Now**

2

Create a Dummy Sub Account

Agency View > Sub Accounts > Create → Select **My Snapshots** → Choose imported snapshot

Name: `[Your Agency] – Master Snapshot for Clients` → Enter YOUR info (name, phone, address, timezone)

3

Customize

See Section 4 for full customization steps.

4

Create Your Own Snapshot

Agency View > Account Snapshots > Create New Snapshot → Select your customized sub account → Select **ALL assets** → Save

TIP

Refresh Snapshot after updating the master sub account. Use **Push Update to Linked Accounts** for changes like snippets — but NOT for calendar/opportunity changes (those require manual verification).

4 Master Snapshot Customization

Before deploying to clients, customize these items in your master sub account:

+ 4.1 Dashboard

+ 4.2 Snippets (Conversations > Snippets)

+ 4.3 Plus-One Messages (Automation)

+ 4.4 Funnels (Sites > Funnels)

+ 4.5 Calendar

5 16-Step Client Account Setup

Complete these steps for **EVERY** new client:

1 **Create Client Sub Account**

Agency View > Sub Accounts > Create > My Snapshots → Select your master snapshot → Enter client info from onboarding form (name, phone, email, address, timezone)

2

A2P Phone Registration

Settings > Phone Numbers > Trust Center

Complete **Brand Registration** first, then **Campaign Registration**. Takes a few days for approval — start early. Use Lead Connector (GHL's phone provider).

3

Add Client as User

Settings > Staff > Add User → Enter owner name, email, phone

Grant ONLY these 5 permissions:

1. Dashboard: View only
2. Conversations: View and Manage
3. Calendar: Manage + View appointments
4. Contacts: View and Manage (NO bulk actions)
5. Opportunities: View, Manage, Update lead value

Set role to **User** (not Admin). Create password & send login URL.

4

Verify Dashboard Configuration

- **Metric:** Count of Contact (leads) or Count of Opportunity (everything else)
- **Date property:** "Created on" for leads; "Updated on" for all others
- **Conditions:** Correct pipeline stage + correct tag per section

KNOWN BUG

"Scheduled" and "Showed" widgets may not preload stages. Fix: delete widget, re-add with correct settings.

5

Automation Updates (Only 2 things)

1. **Reactivation initial message:** Insert the client's offer (PLURAL form) into the first text
2. **Scheduling picture:** Upload client's logo + available time slots screenshot into the first reactivation nurture message

6

Sites & Funnels Setup

- Update business logo on referral landing page (desktop + mobile)
- Update scheduling page verbiage to match industry
- Match brand colors using **Color Picker** Chrome extension (get hex from logo)
- Same updates on ad funnel if running ads

7

Domain Setup

- Buy a universal domain on GoDaddy (e.g., `reservemyvouchertoday.com`) — ~$12/year
- Connect to GHL: **Settings > Connect Domain** → add A record + CNAME in GoDaddy DNS
- Set unique paths per client: `/opt-in-[location]`, `/schedule-[location]`, `/referral-opt-in-[location]`, `/referral-schedule-[location]`
- Same domain works across 100+ locations with different paths
- **Publish all pages** after setup

8

Trigger Links

Set up these two trigger links:

1. **Google Review URL:** Google Business Profile > Ask for Review > copy link
2. **Review Referral Link:** Your referral landing page URL

Verify in ALL these workflows: Review Reactivation (3 places), Appointment Showed (3 places), Reply Not Recognized Positive (3 places), Click to Leave Review.

9

Calendar Setup

SETTING	VALUE
Slot interval	**15 minutes**
Meeting duration	**30 minutes max**
Date range	**5 days** (push same-day/next-day)
Max bookings/day	**Unlimited**
Max bookings/slot	**1** (2-3 for high-volume)
Pre-populated fields	**ON**
Auto-confirm meetings	**ON** (required for reminders)
Allow rescheduling	**OFF**
Google calendar invites	**OFF**
Link client calendar	**Do NOT link**

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Custom Values

CUSTOM VALUE	EXAMPLE	NOTES
Ad Offer	"free 14 day pass"	The offer in ad campaigns
Agency Email Internal	your@agency.com	Or Slack webhook
Agency Email (From)	your@agency.com	"From" field in emails

CUSTOM VALUE	EXAMPLE	NOTES
Agency Name	Your Agency Name	Used in email sender name
Coach Name	John	Person taking appointments
Email Appt Notification	client@biz.com	Client's email for notifications
Location Address	123 Main St, City, ST	Full street address
Location City	Tampa	City name
Location Name	Tampa Fitness	Business name
Location Phone	(813) 555-1234	Cell of appointment-taker
Pass/Voucher/Class Pack	pass	Singular noun for offer type
Reactivation Offer	free 14 day pass	Singular form
Referral Offer	free 14 day pass	Same or different offer
Review Offer	free 1yr membership	Big raffle offer, done bi-yearly

11 Integrations

1. **Google Business Profile:** Settings > Integrations > Google > sign in with manager-access Google email > select location
2. **Facebook Lead Form:** Connect page > configure field mapping (first name, last name, email, phone)
3. **Review AI Agent:** Reputation > Settings > edit agent > set to **5-star reviews only**
4. **Facebook trigger:** Delete old trigger in New Ad Lead Form Submission > add Facebook Lead Form Submitted > select page + form

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Buy Phone Number

Only AFTER A2P brand + campaign approved.

Manage Numbers > Add Number → filter by business area code

SETTING	VALUE
Whisper message	OFF
Call recording	OFF (decreases conversion)
Call timeout	30 seconds
SMS compliance	Both OFF
Messaging limit	10,000

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Email Service (Lead Connector)

- Connect Lead Connector at agency level (one-time setup)
- Add dedicated domain: add DNS TXT records to GoDaddy
- Verify all records
- In client sub account, verify Lead Connector is connected

14

Publish All Workflows

Go through every workflow folder. Verify every workflow is **Published** (not Draft).

15

Double-Check Everything

- [ ] Dashboard conditions (all 5 sections, correct tags + stages)
- [ ] Automation (reactivation offer + scheduling picture)

- [ ] Sites/funnels (logos, verbiage, colors, links)
- [ ] Trigger links (Google review URL + referral link in all workflows)
- [ ] Calendar settings (name, hours, slot interval, auto-confirm)
- [ ] Custom values (all 14 fields populated)
- [ ] Integrations (Google, Facebook, Review AI Agent, workflow trigger)
- [ ] Phone number (purchased, correct area code, settings configured)
- [ ] Email service (Lead Connector connected and verified)
- [ ] All workflows published

16 **Test Every Workflow**

See Section 7: Testing & QA Checklist

6 Workflow Reference Guide

Ads Folder

WORKFLOW	TRIGGER	PURPOSE
New Ad Lead Form Submission	FB lead form submitted	Nurture non-bookers (7 msgs / 7 days)
New Ad Lead Appt Confirmation	Booked + `new ad lead` tag	Confirm self-booked appointments
New Ad Lead Appt Reminder	Booked + confirmed + `new ad lead`	Reminders: 48h, 24h, 1h, 15min

WORKFLOW	TRIGGER	PURPOSE
Past Appointments	Added from reminder workflows	Nag client to update appt status
Canceled Nurturing	From Appt Status workflow	4 msgs / 4 days to reschedule
No-Show Nurturing	From Appt Status workflow	4 msgs / 4 days to reschedule
Future Follow-Up	Manually added	For leads outside 5-day window
Appt Status Updates ("The Brain")	Multiple triggers	Routes contacts, updates tags/pipeline
5 Min Response Needed	Customer replies SMS	Alerts agency if no response in 5 min
DND Safety Net	Reply "stop" / DND tag	Enables Do Not Disturb
Alert User	`alert user` tag	Alerts client for help responding
Lead Assistant Alert	`lead assistant alert` tag	Alerts client: prospect at the door

Reactivation Folder

WORKFLOW	TRIGGER	PURPOSE
AI Text Reactivation	Manual add	Initial reactivation message with offer
New Reactivation Lead Nurture	`new reactivation lead` tag	Book appt after "yes" reply
Reactivation Appt Reminders	Booked + `new reactivation lead`	48h, 24h, 1h, 15min reminders

Review & Referral Folder

WORKFLOW	TRIGGER	PURPOSE
Review Reactivation (Active)	Manual add	Ask rating → positive/negative branch
Appt Showed Review Request	Showed/Sold/Completed	Post-appointment review ask (30 min delay)
New Google Review Tracking	New Google review	Tag + notify for pos/neg reviews
Click to Leave Review	Clicks review trigger link	Remove from review workflows (20 min)
Reply Not Recognized (+)	Manual add	Mirror positive branch
Reply Not Recognized (-)	Manual add	Mirror negative branch
Referral Nurture	Referral form submitted	Nurture referred lead to book
Referral Appt Confirmation	Booked + `referral` tag	Confirm appointment
Referral Appt Reminders	Booked + `referral` tag	48h, 24h, 1h, 15min reminders

Website Folder

WORKFLOW	TRIGGER	PURPOSE
New Website Lead Form	Form or external trigger	Nurture to book (7+ messages)
Website Lead Confirmation	Booked + `web lead` tag	Confirm appointment
Website Lead Reminders	Booked + `web lead` tag	48h, 24h, 1h, 15min reminders

7 Testing & QA Checklist

Test EVERY workflow for each new client account before going live:

+ Facebook Ad Lead Test

+ Appointment Lifecycle Test

+ Google Review Test

+ Referral Test

+ Funnel Booking Test

+ Reactivation Test

+ Website Lead Test

+ Utility Workflow Tests

8 Reactivation Campaign Operations

How to Run Reactivation Campaigns

1. **Schedule:** Monday through Thursday only
2. **Volume:** 10 contacts/day if list < 200; 20 contacts/day if list > 200
3. **Process:** Manually add contacts to the AI Text Reactivation workflow
4. **Message:** "Hey [name], we have a few [offer plural] to give away. Would you like one?"
5. **Reply "yes":** System auto-adds `new reactivation lead` tag → nurture sequence

6. **Reply otherwise** (sure, absolutely): Team manually adds the tag

How to Run Review Reactivation (Active Customers)

1. **Schedule:** Monday through Thursday only
2. **Volume:** 10/day if list < 200; 20/day if list > 200
3. **Process:** Manually drip contacts into Review Reactivation workflow
4. **Message:** Asks for 1-5 rating with raffle offer incentive
5. **Positive (5):** Auto-sends Google review link + referral ask
6. **Negative (1-4):** Agency notification + feedback ask + client notification
7. **Non-responders:** Tagged `non-reviewers` after 2 follow-ups

9 Google Review Campaign Operations

Review Strategy

Two Sources

1. Active customer list campaigns (manual drip)
2. Post-appointment automatic workflow (after showed/sold)

The Filter

- Only **5-star respondents** get pushed to Google
- 4-and-below get a private feedback request
- Result: guaranteed 5-star reviews only

BENEFITS

- Guaranteed 5-star reviews only on Google
- Valuable negative feedback captured privately
- SEO improvement from review volume
- Safeguard against public negative reviews

Review Trigger Links (Set Per Client)

1. **Google Review URL:** Google Business Profile > "Ask for Review" > copy link
2. **Referral Landing Page URL:** Your published referral page URL

10 Troubleshooting & Key Settings

Workflow Settings (Most Workflows)

SETTING	VALUE	REASON
Allow Re-entry	**ON**	Contact may re-enter months later
Allow Multiple Opportunities	**OFF**	Prevents double-tracking
Stop on Response	**OFF**	Response != booked — keep following up
Communication Window	**7 AM - 10 PM**	Messages sound like they come from a person

Wait Logic

HOW IT WORKS

Use **4-hour wait + "resume at" specific time** to ensure messages go day-by-day. Example: Opt in Tuesday 1:03 PM → first follow-up at 8:45 AM Wednesday.

Common Issues

ISSUE	FIX
Dashboard widgets don't show stages	Delete widget, re-add with correct pipeline conditions
Custom values not populating	Verify all 14 custom values filled in Step 10
Review workflow fires for non-review replies	`review requested` tag prevents 5-min response interference
Email "from" field reverts	Known GHL bug — double-check after testing
Reactivation not personalized	Offer must be manually inserted (not a custom value)

GHL Plan Requirements

PLAN	COST	SUB ACCOUNTS	DASHBOARDS
Starter	$97/mo	3	None
Pro	$297/mo	Unlimited	1
SaaS	$497/mo	Unlimited	Unlimited

№ Quick Reference: Tag → Dashboard Mapping

TAG	TRACKS	DASHBOARD SECTION
`new ad lead`	Paid advertising leads	Marketing Results
`new reactivation lead`	Reactivation campaign leads	Reactivation Results
`referral`	Referral form submissions	Referrals
`web lead`	Website form leads	Website Leads

TAG	TRACKS	DASHBOARD SECTION
`positive reply`	5-star review respondents	Google Reviews
`negative reply`	1-4 star respondents	Google Reviews
`positive review`	Confirmed Google 5-star review	Google Reviews
`negative review`	Non-5-star Google review	Google Reviews
`review requested`	Contacts in review workflow	(Excludes from 5-min response)
`non-reviewers`	Didn't respond to review ask	(For future campaigns)
`DR Sent`	Reactivation message sent	(Tracking)
`appointment booked`	Has a booked appointment	(Pipeline tracking)
`alert user`	Needs client help responding	(Triggers notification)
`lead assistant alert`	Prospect at the door	(Triggers client text)

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