STRETCHLEARN · WORKBOOK

Sales Funnel Automation with Go High Level — Workbook

This workbook turns the course into a real build inside your own GoHighLevel sub-account. Each section maps to a module and asks you to set up, write, and test a working piece of your funnel: compliance foundations, the capture pages, the SMS and email workflows, and the booking, pipeline, and snapshot that make it resellable. Work through it in order, because each section depends on the one before. By the end you will have a live lead-to-booked-call funnel and a documented snapshot you can deploy for clients.

Sub-Account Setup, Compliance, and Sending Foundations

Stand up a clean sub-account and clear the two compliance gates (A2P 10DLC and domain authentication) that decide whether your automation delivers at all.

Worksheet: Sub-Account and Foundations Setup Record

Fill this in as you create the sub-account and work the Launchpad. The time zone field matters most, because it drives every scheduled send and calendar slot.

Sub-account business name

Time zone (must be the client's real local zone)

From name and business email for outbound

Connected phone number

Sending domain to authenticate

Connected calendar provider (Google / Outlook)

Payment processor connected (yes / no)

Exercise: Draft Your A2P 10DLC Brand and Campaign Submission

Write the exact details you will submit in the Trust Center before you click submit, so registration is processing while you build. Use your real legal business identity.

• What is the exact legal business name, EIN or business number, and website you will submit, and do all three match each other?

• How do your contacts opt in to be texted (form consent checkbox, logged verbal, or keyword), described in one sentence?

• Write two sample messages that include your business name and a Reply STOP to opt out instruction.

• Are you registering as Standard Brand or Sole Proprietor, and how does that affect your sending throughput?

Checklist: Go-Live Compliance Checklist

[ ] Sub-account created blank with the correct time zone set
[ ] A2P 10DLC Brand and Campaign submitted before building the funnel
[ ] Opt-in consent language present on the capture form
[ ] Sending domain added and SPF, DKIM, DMARC, and tracking records pasted into DNS
[ ] Test email checked in Gmail via Show original shows SPF, DKIM, and DMARC all PASS
[ ] STOP opt-out handling confirmed and quiet-hours plan in place

Building the Funnel: Pages, Forms, and Capture

Build the visible front of the funnel: a focused opt-in page, a form that triggers automation, and a thank-you page that asks for the booking.

Worksheet: Opt-In Page and Form Specification

Define your opt-in step before you build it. Keep the form short and the page single-purpose, then use this as your checklist inside the builder.

Funnel name and opt-in step URL path

Headline (the single specific offer or outcome)

Form fields collected (keep to name, email, phone unless justified)

Custom fields needed (e.g. Service Interested In, Budget)

Consent checkbox wording

Button copy (action words, not Submit)

Source tag applied on submission

On-Submit redirect destination (thank-you step)

Exercise: Design the Thank-You Page Conversion Moment

Plan the post-submit page to deliver the promise and immediately offer the next step (usually booking) while the lead is at peak intent.

• How do you deliver the promised item on the page (download button, or note that it is in their inbox)?

• What single next action does the page ask for, and is the calendar embedded directly?

• What expectation-setting line tells the lead a text is coming and from which number?

• Which thank-you pattern fits your offer: deliver-and-book, deliver-and-watch, or tripwire, and why?

Checklist: Funnel Build and Test Checklist

[ ] Opt-in page has no navigation menu or competing links
[ ] Page previewed and adjusted in the mobile view, and loads fast
[ ] Branded domain connected so the funnel is not on a generic GHL URL
[ ] Form submitted live with a real email and phone you control
[ ] Contact appears under Contacts with every field and the consent recorded
[ ] Source tag applied and On-Submit redirect lands on the thank-you step

Workflows: SMS, Email, and the Booking Sequence

Build the automation engine: an instant speed-to-lead response and a multi-day nurture that branches on replies and stops the moment a lead converts.

Exercise: Write Your First-Five-Minutes Sequence

Draft the immediate-response workflow on the Form Submitted trigger. The first SMS must fire with no wait step, sound human, reference what they asked for, and end in a question.

• Write the immediate SMS, including the lead's first name merge field, the deliverable, a booking ask, and Reply STOP.

• What does the deliverable email contain, and is the calendar link the main button?

• Who gets the internal notification, and what details does it include so a human can call fast?

• Where does the time-window setting hold overnight triggers until business hours, and what is that send time?

Worksheet: Five-Day Nurture and Branch Map

Lay out each touch in the multi-day nurture, the channel, the angle, and the branch logic. Note where each If/Else exits anyone who replied or booked.

Day 2 — channel and message angle (e.g. case study)

Day 3 — channel and qualifying question

Day 4 — channel and the objection it answers

Day 5 — channel and deadline or last-chance framing

If/Else exit condition checked after each touch (replied / booked tag)

Customer Replied handling (how a reply pulls them into a human conversation)

Unconverted destination (tag + re-engagement or monthly newsletter)

Checklist: Workflow Safety and Test Checklist

[ ] Form Submitted trigger filtered to the specific opt-in form, not a broad tag
[ ] Allow Re-Entry set correctly (usually off) for the welcome sequence
[ ] An exit branch built before the persuasion, removing booked or replied contacts
[ ] Every send respects business hours via the Wait time-window option
[ ] Walked yourself through every branch as a test contact while in Draft

[ ] Published only after each path behaved, with live step counts checked

Booking, Pipelines, and Reselling the Build

Close the loop with a booking calendar and an Opportunities pipeline, then package the whole build as a snapshot you can white-label and resell.

Worksheet: Calendar and Reminder Configuration

Define your booking calendar so the day stays workable and no-shows drop. Set real availability, a buffer, and the reminder cadence.

Slot length (e.g. 15 or 30 minutes)

Buffer after each booking

Real availability windows (days and hours)

Minimum scheduling notice (e.g. no bookings within 2 hours)

Connected calendar for two-way sync (Google / Outlook)

Reminder cadence (24-hour and 1-hour messages)

No-show recovery message and reschedule link wording

Exercise: Design Your Opportunities Pipeline and Automation

Define a pipeline whose stages name observable events, then map which workflow action moves a deal into each stage automatically.

• List your pipeline stages using observable events (e.g. New Lead, Booked Call, Showed, Proposal Sent, Won, Lost).

• Which workflow action creates the opportunity, at what stage, and with what estimated value?

• Which appointment events move the deal to Booked Call and Showed, and how is a No-Show handled?

• What lost reasons will you capture, and how will you flag zombie deals with no movement in 21 days?

Checklist: Snapshot and White-Label Readiness Checklist

[ ] All hard-coded business name, phone, and address replaced with merge fields or clear placeholders
[ ] Every workflow trigger points at template assets (the form, the calendar) that travel with the snapshot
[ ] Snapshot created from the Agency view, named, and versioned
[ ] Snapshot tested by loading into a fresh blank sub-account
[ ] Per-account setup checklist written (connect domain, register A2P, set business hours)
[ ] White-label domain, logo, and rebilling markup configured before onboarding paying clients

Your Action Plan

1. Create a blank sub-account with the correct time zone, then submit your A2P 10DLC Brand and Campaign so registration processes while you build.
2. Authenticate your sending domain (SPF, DKIM, DMARC, tracking) and confirm a test email passes all three in Gmail's Show original.
3. Build a single-purpose opt-in funnel step with a short form, consent checkbox, source tag, and a redirect to a thank-you step.
4. Make the thank-you page deliver the promise, embed the calendar, and set the expectation that a text is coming.
5. Build the speed-to-lead workflow on Form Submitted: an instant SMS, the deliverable email, and an internal notification, all respecting business hours.
6. Extend it into a five-day nurture that branches on replies and bookings, with an exit that stops selling the moment a lead converts.
7. Configure the booking calendar with real availability, a buffer, two-way sync, and 24-hour and 1-hour reminders.
8. Add a No-Show recovery workflow and a Showed branch that moves the lead into the post-call follow-up.
9. Build an Opportunities pipeline with observable stages and wire workflow actions to create and move deals automatically.
10. Generalise the build, save it as a versioned snapshot, test it in a fresh sub-account, then configure white-label and rebilling before onboarding clients.