

CRM & AUTOMATION SYSTEM IMPLEMENTATION FOR A PROFESSIONAL SERVICES BUSINESS

Designed and implemented a complete client acquisition system inside GoHighLevel for a service-based consulting business. The project demonstrates how disconnected marketing, lead management, appointment booking, and sales processes can be transformed into a streamlined CRM experience using automated workflows, sales pipelines, booking funnels, and contact management.

The implementation was designed to reduce manual administrative work while providing a structured customer journey from initial inquiry through client conversion.



PLEASE NOTE: The person in this image is not the actual client. This is a presentation for portfolio purposes only. Clients identity is kept private for confidentiality.

PROJECT OBJECTIVE

Build a scalable client acquisition system that could:

- Capture leads automatically
- Organize contacts inside a CRM
- Qualify prospects through automated workflows
- Manage appointments and follow-ups
- Track every opportunity through a structured sales pipeline
- Reduce manual administrative work
- Create a repeatable client journey

MY ROLE

LEARNING EXPERIENCE & PLATFORM IMPLEMENTATION CONSULTANT

RESPONSIBILITIES INCLUDED:

- CRM architecture
- Sales pipeline design
- Workflow automation
- Funnel creation
- Contact segmentation
- Lead lifecycle mapping
- Automation logic
- User experience planning
- Quality assurance
- System testing

CHALLENGES

The business needed a structured system that could support growth without increasing administrative workload.

Key challenges included:

- Leads arriving from multiple sources
- Manual follow-up processes
- No standardized sales journey
- Difficulty tracking lead status
- Inconsistent client communications
- No centralized CRM process
- Limited visibility into sales progress
- Risk of leads falling through the cracks

THE SOLUTION

CRM Setup

- Contact management
- Smart lists
- Tagging strategy
- Contact segmentation

Sales Pipeline

Created a structured client acquisition pipeline with clearly defined stages:

- New Lead
- Call Booked
- Strategy Session Completed
- Proposal Sent
- Client Won
- Onboarding

Funnel Design

Created an appointment booking funnel including:

- Offer page
- Booking page
- Thank-you page

Workflow Automation

Built multiple automated workflows handling:

- New lead processing
- Appointment reminders
- Opportunity creation
- Internal notifications
- Lead qualification
- Stage progression
- Conditional branching
- Wait conditions
- Automatic workflow exits

THE RESULTS

THE COMPLETED IMPLEMENTATION DEMONSTRATES A FULLY CONNECTED CLIENT ACQUISITION PROCESS WHERE:

- Leads are automatically captured and organized
- Opportunities are created without manual entry
- Contacts progress through predefined sales stages
- Appointment bookings trigger the next automation
- Internal notifications reduce response delays
- Sales activities become easier to monitor
- Client information remains centralized inside one CRM

SCOPE OF WORK

CRM Strategy

- CRM architecture
 - Customer journey mapping
 - Lead lifecycle planning
-

CRM Build

- Contact database
 - Custom tagging
 - Smart Lists
 - Pipeline configuration
-

Sales System

- Opportunity management
- Stage automation
- Sales tracking

Automation

- Workflow creation
 - Conditional logic
 - Internal notifications
 - Wait timers
 - Opportunity updates
 - Enrollment logic
-

Funnel

- Booking funnel
 - Appointment pages
 - Thank-you page
-

Quality Assurance

- Workflow testing
- Logic validation
- CRM testing
- User flow verification

SKILLS DEMONSTRATED

CRM STRATEGY

- CRM Design
- CRM Architecture
- Customer Journey Mapping
- Lead Lifecycle Design

GOHIGHLEVEL

- CRM Setup
- Workflow Automation
- Funnel Builder
- Opportunity Pipelines
- Contact Management
- Smart Lists
- Tags
- Automations

BUSINESS SYSTEMS

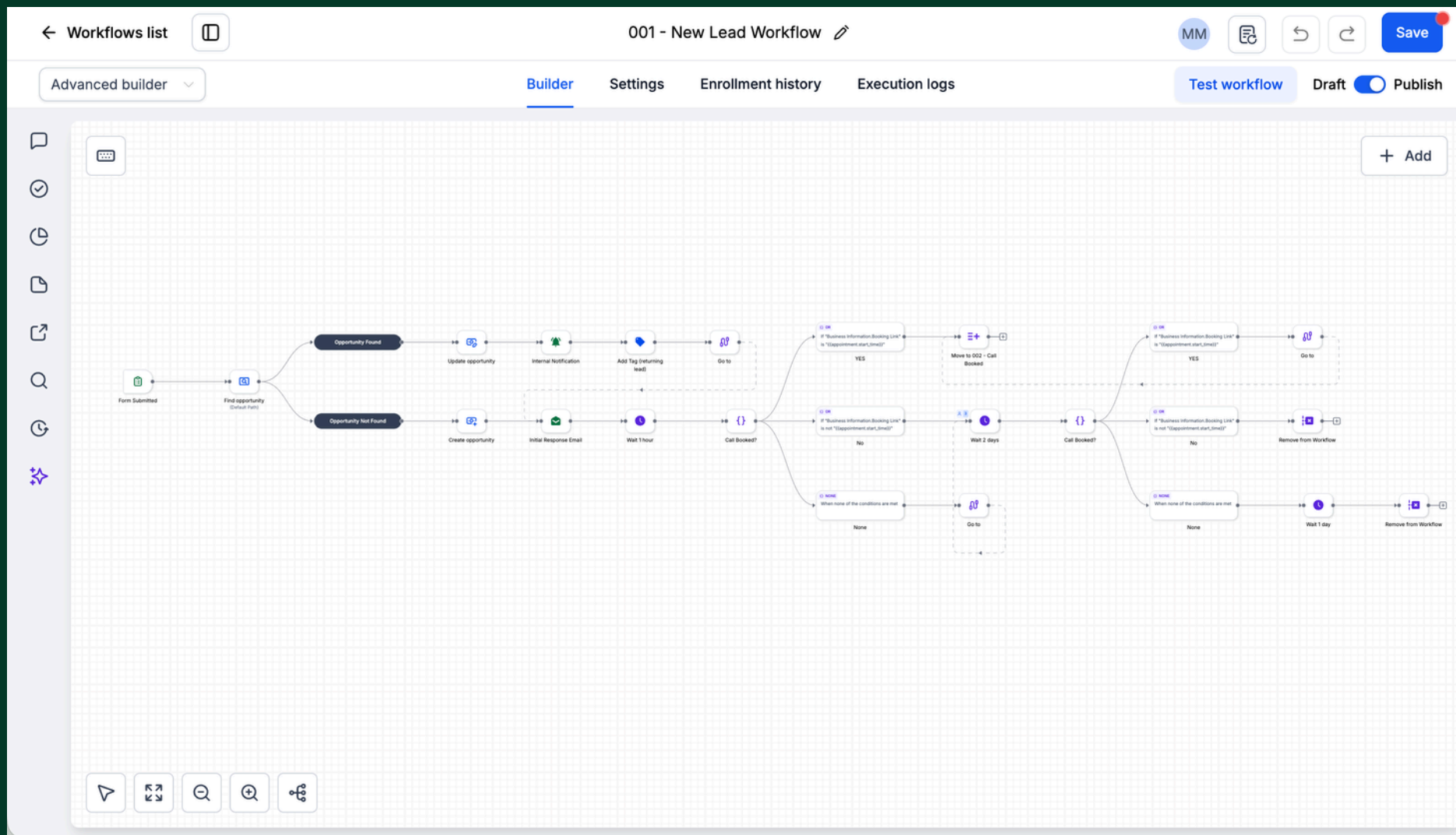
- Sales Process Design
- Lead Qualification
- Process Automation
- Business Operations
- Client Journey Optimization

TECHNICAL

- Conditional Logic
- Workflow Branching
- Automation Testing
- QA
- Documentation

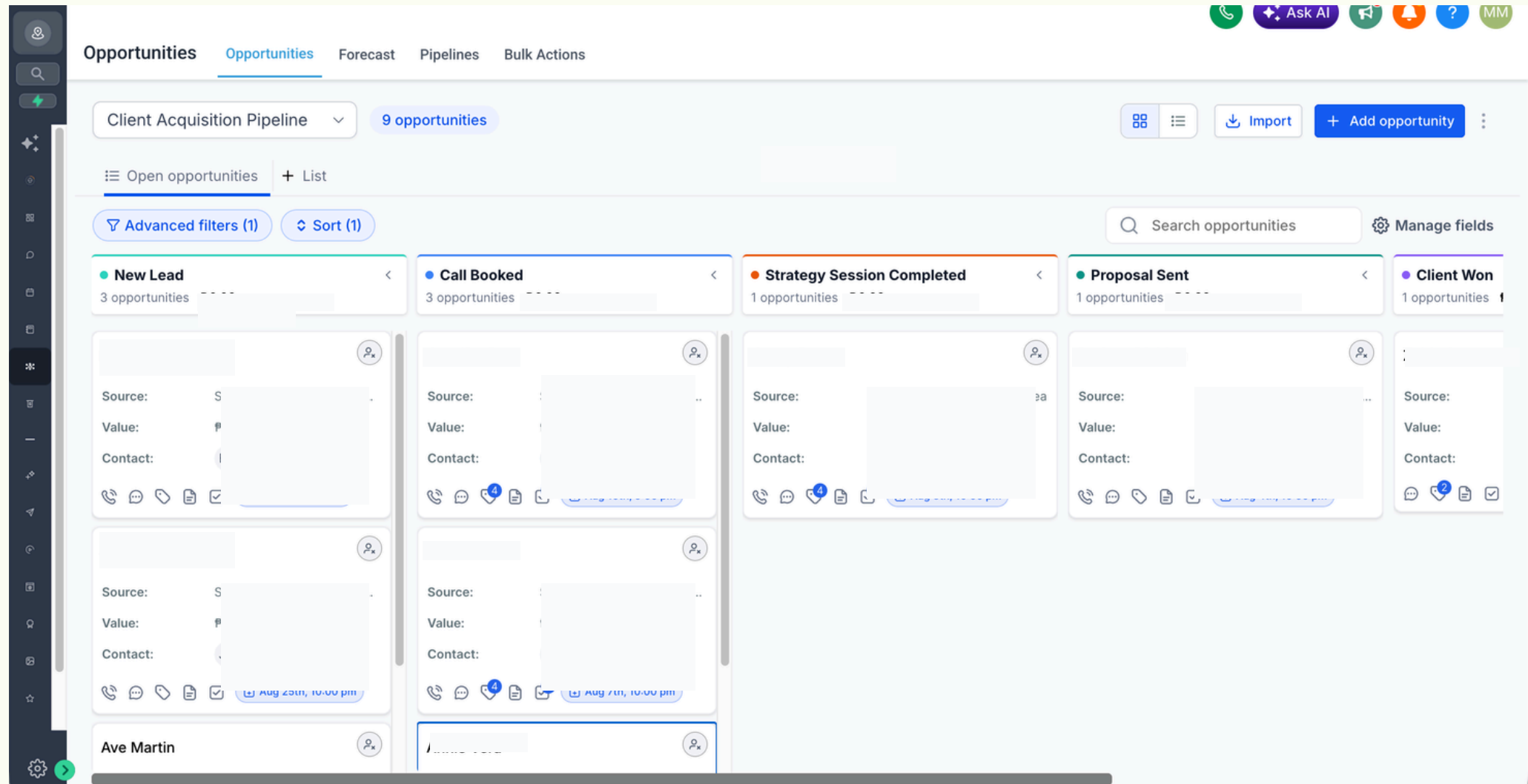
GoHighLevel Workflow Management

Built a modular automation system consisting of multiple workflows that manage different stages of the client journey. Separating automations by lifecycle stage makes the system easier to maintain, troubleshoot, and expand as the business grows.



Lead Qualification Automation

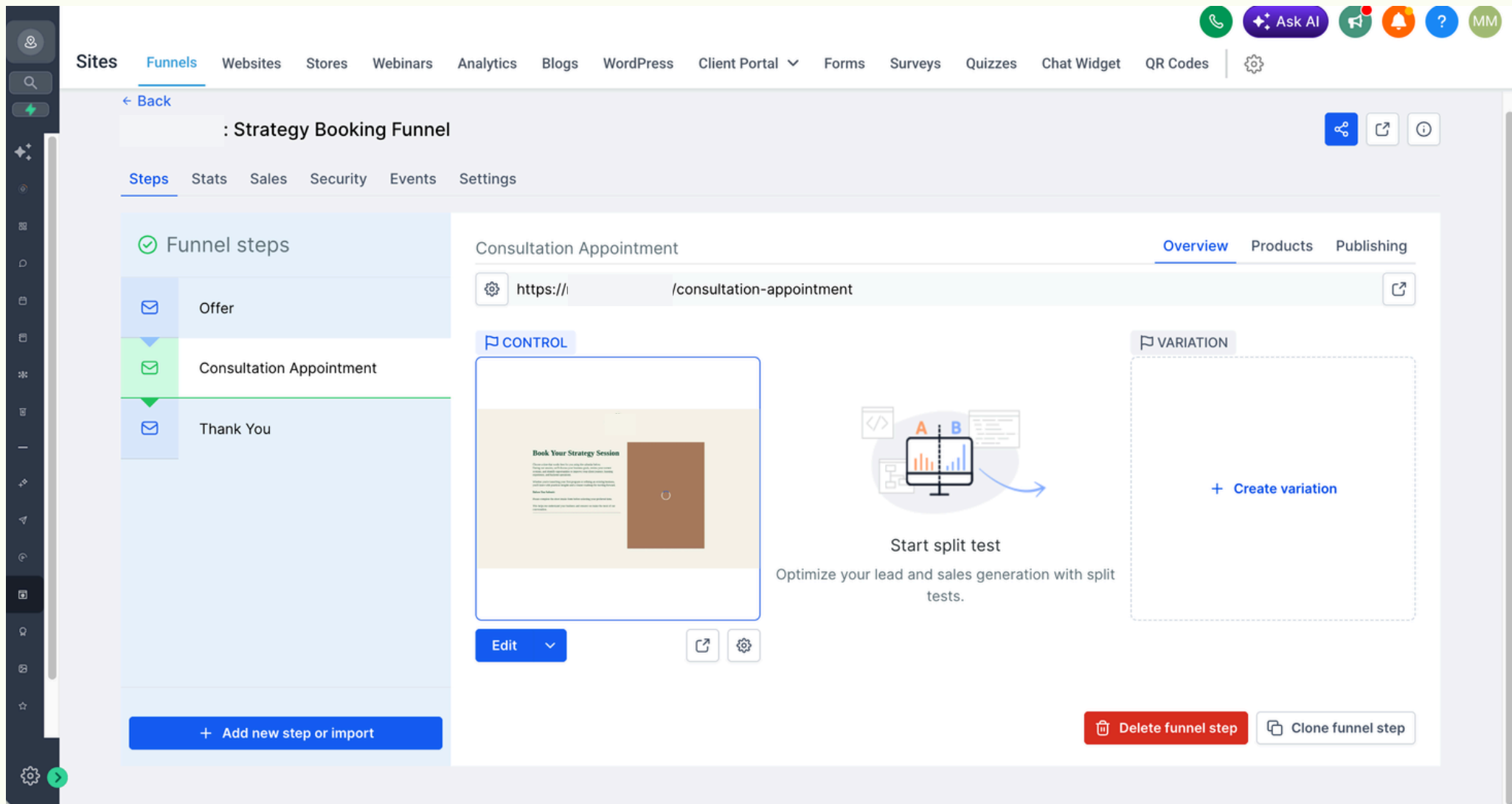
Designed an intelligent lead intake workflow that automatically creates or updates opportunities, sends confirmation emails, applies tags, waits for booking activity, and routes contacts using conditional logic. This workflow minimizes manual follow-up while ensuring every inquiry follows a consistent customer journey.



Client Acquisition Pipeline

Created a structured sales pipeline that enables the business to monitor every lead from initial inquiry through proposal and client conversion.

Each stage represents a measurable milestone within the sales process, improving visibility and forecasting.



Appointment Funnel

Designed a streamlined appointment funnel that guides prospects through a simple booking experience while integrating directly with the CRM.

The funnel automatically supports lead capture and enrollment into the appropriate automation sequences.

Contact name	Phone	Email	Busi...	Created (CST)	Last activity...	Tags
JD				Aug 2, 2026 03:17 PM	6 hours ago	booked warm lead high priority +1
JD				Aug 2, 2026 03:15 PM	6 hours ago	booked warm lead high priority +1
DS				Aug 2, 2026 02:55 PM	7 hours ago	booked warm lead high priority +1
DM				Jul 30, 2026 03:16 AM	2 days ago	
BS				Jul 30, 2026 03:08 AM	2 days ago	
MM				Jul 30, 2026 02:49 AM	2 days ago	
JD				Jul 30, 2026 02:45 AM	2 days ago	
AM				Jul 30, 2026 02:39 AM	2 days ago	

Contact Management

Configured a centralized contact database using segmentation, Smart Lists, and tagging to organize leads according to engagement and sales status.

The CRM structure allows faster filtering, targeted follow-up, and cleaner customer data management.

BUSINESS VALUE

This implementation demonstrates how CRM strategy and automation can improve operational efficiency by replacing repetitive manual tasks with structured business systems.

The completed system enables businesses to:

- Respond to leads faster
- Standardize the customer journey
- Improve sales visibility
- Reduce administrative workload
- Maintain cleaner customer data
- Scale lead management more efficiently
- Deliver a more consistent client experience

CATEGORY

Industry

Client Type

Project Category

Platform

Duration

Project Status

DETAILS

- Professional Services
- Client Implementation
- CRM Implementation | Sales Automation | Business Systems | GoHighLevel
- GoHighLevel
- Approximately 2–3 weeks (end-to-end implementation)
- Completed Implementation



LET'S WORK TOGETHER!

LET'S SCHEDULE A CHAT.