

From first call to a CRM that runs itself.

REACH OUT IF THIS SOUNDS LIKE YOUR TEAM

- You run a sales team on GoHighLevel and nobody truly owns the CRM.
- Pipeline stages are messy, stale or don't match how you actually sell.
- You can't trust your numbers: bookings, shows, closes.
- Leads come in, but follow-up is slow or inconsistent.
- Booked calls no-show and there's no system to recover them.
- You or your sales manager spend selling time doing CRM admin.

01

You reach out

Email or call and we'll book a discovery meeting.

02

Discovery meeting

We review your sales process, where it's breaking and what you need, and decide together whether this is a fit. If it is, we book the onboarding meeting.

03

Onboarding meeting

You grant access to your GoHighLevel account. You walk me through how your sales channel runs: lead sources, offers, team roles, pipeline stages and handoffs between setters and closers.

04

Setup

I audit your account and rebuild it around how you actually sell: pipelines, follow-up and booking automations, user roles and your reporting dashboard.

05

Ongoing management

Every month, I keep the system clean, running and improving.

WHAT I DO EVERY MONTH

- **Pipeline hygiene:** move stale deals, fix stages and tags, merge duplicates.
- **Automation monitoring:** check follow-up and speed-to-lead workflows, fix anything broken.
- **Calendars and booking:** availability, round-robin, confirmations and no-show recovery.
- **Contacts:** load new lists, assign contacts to users, segment and tag.
- **Users:** add or remove team members and set permissions.
- **Data quality:** lead sources, custom fields and attribution kept accurate.
- **Integrations:** forms, calendars, phone and SMS checked and working.
- **Builds:** up to 4 new automations or workflow changes.

YOUR MONTHLY REPORT

Lead volume by source, speed-to-lead, booking, show and close rates, pipeline value, the work completed this month, and what I recommend fixing next.

REQUESTING WORK

Send requests anytime. Turnaround is 48 hours on business days. Common requests:

Load new contacts · Assign contacts to users · Create a new automation · Add a team member · Build a new pipeline or calendar