GoHighLevel Agency Snapshot Starter Pack

Everything you need to onboard your first client in under 45 minutes: pipelines, automations, scripts, and the exact setup sequence.

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GHL reviews & guides

WHAT'S INSIDE	PLUS	AND
5 Industry Snapshot blueprints 8 core agency automations	Full agency pipeline map (7 stages) 12 SMS & email script templates	30-day agency launch sequence Day-by-day setup priority list

What Is a GHL Snapshot and Why Does It Matter?

A Snapshot is a complete, pre-built copy of a working GoHighLevel sub-account. It contains pipelines, automation workflows, email sequences, SMS templates, forms, and calendars, all configured and ready to deploy. When you load a Snapshot into a new client sub-account, that client goes from empty platform to a working business system in minutes, not days.

Agencies use Snapshots to:

45 minutes
Average client onboarding time with a Snapshot vs 4–6 hours from scratch.

Consistent delivery
Every client gets the same quality system, not whatever you had time to build this week.

Repeatable profit
Build once, deploy to unlimited clients. Your setup cost is paid on the first client.

This guide gives you the blueprint for 5 industry Snapshots: the structure, automations, pipeline, and scripts for each. Use these as the starting point when you build your own Snapshots inside GoHighLevel.

1 The 5 Agency Snapshots

One per industry vertical, each deploys a complete working system for that client type.

01 Local Service Business

CONTRACTORS / HOME SERVICES

WHAT THIS SNAPSHOT GIVES YOU

Turns missed calls and slow quote follow-up into booked jobs automatically. Built for plumbing, HVAC, roofing, electrical, landscaping, painting, and cleaning.

INCLUDES

- **Missed Call Text Back**
  Any unanswered call → SMS in 15 seconds. Highest-ROI automation for trade businesses.
- **5-touch quote follow-up**
  Day 1/3/5 SMS + email after quote sent. Stops when they reply.
- **Job completion → review request**
  Closed job → Google review SMS within 24 hours.
- **Seasonal reactivation**
  Pre-built campaign targeting past clients in slow months.
- **Referral partner sequence**
  Monthly touchpoint to realtors, property managers, and architects.

CORE AUTOMATION FLOW

Lead calls → Missed Call Text Back → Quote → 5-step follow-up → Job booked → Complete → Review request

⚠ Does NOT replace: Jobber, ServiceTitan, or BuilderTrend for scheduling, dispatching, and invoicing. GHL handles the front-end; those tools handle operations.

02 Real Estate Agent

WHAT THIS SNAPSHOT GIVES YOU

Captures buyer and seller leads from Zillow, Facebook, Google, and open houses, then responds within 60 seconds and nurtures leads until the appointment is booked.

INCLUDES

- **60-second lead response**
  Form submitted → SMS fires in 60s → email at 2m → follow-up SMS at 2h.
- **Buyer and seller pipelines**
  Separate pipelines with probability weighting and automated stage transitions.
- **'What's my home worth?' funnel**
  Landing page captures seller leads → automated CMA delivery + nurture.
- **Past client sphere automation**
  Quarterly check-in SMS, market update email, birthday message, and review request.
- **Open house follow-up**
  Bulk import from sign-in sheet → immediate SMS sequence to all attendees.

CORE AUTOMATION FLOW

Lead arrives → 60s SMS → pipeline entry → nurture sequence → appointment booked → close → past client sphere

⚠ Best for solo agents and small teams. Large teams with complex lead routing may need Follow Up Boss alongside GHL.

03 Insurance Agent

P&C / LIFE / HEALTH / COMMERCIAL

WHAT THIS SNAPSHOT GIVES YOU

Automates quote follow-up (most agents give up after 2 touches; this runs 7), renewal reminders, and cross-sell sequences covering the revenue gaps most insurance CRMs miss.

INCLUDES

- **7-touch quote follow-up**
  SMS at 60s, email at 5m, then Day 1/3/7 follow-ups. Stops on reply.
- **Renewal automation**
  90/30/7-day sequences fire automatically from the renewal date field.

- **Cross-sell trigger**
  Policy-bound → cross-sell sequence (auto/home/life) fires at 30 days.
- **Multi-line pipeline**
  Stages: New Lead → Contacted → Quote Sent → Bound → Active → Renewal Pending.
- **Multi-agent sub-account ready**
  One sub-account per agent, the agency dashboard shows all pipelines at a glance.

CORE AUTOMATION FLOW

Lead captured → immediate follow-up → quote sent → 7-touch sequence → bound → renewal cycle begins

⚠ Does NOT replace: AgencyBloc, Insureio, or Radiusbob for policy management, compliance, and carrier integrations. GHL is the marketing layer.

04 Coach / Consultant

BUSINESS / LIFE / HEALTH COACHING

WHAT THIS SNAPSHOT GIVES YOU

Captures discovery call enquiries and moves leads from first touch to booked call to paid programme with automated nurture, objection handling, and onboarding sequences.

INCLUDES

- **Discovery call funnel**
  Lead magnet → opt-in → nurture sequence → discovery call CTA.
- **Application pipeline**
  Stages: Enquiry → Application → Discovery Call → Proposal → Enrolled → Active Client.
- **Abandoned application follow-up**
  Started but didn't finish → 3-touch recovery sequence.
- **Post-call follow-up**
  Discovery call done → proposal + 48hr follow-up + social proof email.
- **Client onboarding sequence**
  Enrolled → welcome email + portal access + call booking + Day 1 task.

CORE AUTOMATION FLOW

Lead magnet download → email sequence → discovery call booked → proposal sent → enrolled → onboarding starts

05 Local Business

RESTAURANT / SPA / FITNESS / RETAIL

WHAT THIS SNAPSHOT GIVES YOU

Drives Google reviews, automates appointment reminders, reactivates lapsed customers, and runs seasonal campaigns for any location-based business with repeat customers.

INCLUDES

- **Appointment reminder sequence**
  Booking confirmed → 24hr SMS reminder → 1hr reminder → no-show follow-up.
- **Post-visit review request**
  Visit tagged complete → Google review SMS within 24 hours.
- **Lapsed customer reactivation**
  No visit in 60 days → 'We miss you' SMS with offer. Runs automatically.
- **Birthday/anniversary message**
  Custom field trigger → personal SMS + offer on birthday month.
- **Seasonal promo campaign**
  Pre-built email + SMS campaign template for monthly promotions.

CORE AUTOMATION FLOW

Visit complete → review request → repeat booking prompt → lapsed trigger at 60 days → reactivation offer

How to deploy a Snapshot: in your GHL agency account, go to Settings → Snapshots → select a Snapshot → Apply to Sub-Account. The entire system deploys in under 2 minutes. Then customise the business name, contact details, and offer-specific copy before going live.

2 The 8 Core Agency Automations

Every Snapshot includes these. Build once, deploy to every client in that vertical.

These are the eight automations that deliver the most measurable value for clients the fastest. Every new client sub-account should have all eight running before you consider anything else.

#	Trigger	Automated action	Timing
1	**New lead form submitted**	SMS fires within 60 seconds	*Immediately before they can Google a competitor*
2	**Inbound call missed**	Missed Call Text Back SMS fires	*Within 15 seconds of a missed call*
3	**Quote or proposal sent**	5-touch follow-up sequence begins (SMS + email)	*Day 1, 3, 5, 7, 10 stops on reply*
4	**Appointment booked**	Confirmation + 24hr reminder + 1hr reminder	*Automated from the booking trigger*
5	**Appointment no-show**	'Sorry we missed you' SMS + reschedule link	*Within 30 minutes of the no-show tag*
6	**Job/sale marked complete**	Google review request SMS	*24 hours after completion tag*
7	**Lead goes cold (no activity)**	Re-engagement SMS, then email	*7 days after the last activity stop on reply*
8	**Past client seasonal trigger**	Seasonal campaign SMS + email	*Pre-scheduled runs automatically*

Building tip: build each automation in a master Snapshot sub-account first, test it fully with a real contact, then save it as a Snapshot. Every future client gets a tested, working system, not a work in progress.

3 The Agency Pipeline Map

One pipeline to manage your own agency prospects, separate from client pipelines.

Most agencies focus on building pipelines for their clients, but never build one for themselves. This seven-stage pipeline tracks your own new business development inside GHL.

Pipeline stage	What happens automatically	What to track
1 New Enquiry	SMS + email confirms receipt within 5 minutes	*Response rate, time to first contact*
2 Discovery Booked	Calendar confirmation + 24hr reminder sent	*Show rate on discovery calls*
3 Discovery Done	Follow-up email with case study + next-step CTA within 2 hours	*Call-to-proposal conversion rate*
4 Proposal Sent	Day 2 check-in SMS + Day 5 follow-up email stops when they respond	*Proposal-to-close conversion rate*
5 Negotiating	Manual task assigned to the rep. No automated pressure at this stage.	*Average deal size, cycle length*
6 Closed Won	Onboarding email sequence + sub-account setup task + welcome message	*Onboarding completion time*
7 Active Client	Monthly check-in SMS + quarterly review booking prompt + referral ask at 90 days	*Retention rate, NPS, referrals*

Stage 5 note: Do not automate pressure on prospects who are negotiating. The automation deliberately pauses at this stage. Automated follow-up during negotiation reads as desperation and damages close rates.

4 SMS & Email Script Library

12 copy-paste templates customise the brackets, load into GHL workflows.

These scripts are written for brevity and conversational tone. Replace all [bracketed fields] with GHL custom values before deploying. GHL syntax: {{contact.first_name}}, {{custom.review_link}} etc.

Speed-to-lead SMS (fires in 60 seconds)

TRIGGER: FORM SUBMIT

Script 1A General service

Hi [first_name], thanks for reaching out to [business_name]! We'll be in touch shortly. Feel free to reply here with any questions.

Note: Keep it short. The goal is to confirm receipt before they contact a competitor.

Script 1B Real estate

Hi [first_name], thanks for your enquiry about [address / area]. I'll follow up with initial thoughts shortly. Best, [agent_name]

Note: Personalise with property address or suburb if captured in the form.

Missed Call Text Back

TRIGGER: MISSED INBOUND CALL

Script 2A Trade/contractor

Hi, sorry we missed your call! This is [business_name]. Can we help with a quote or booking? Reply here or call us back on [phone_number].

Note: Response within 15 seconds. Typically recovers 10–30% of missed inbound calls.

Script 2B Professional services

Hi there, sorry we missed you. This is [business_name]. Happy to call you back or answer any questions here. What can we help with?

Note: Softer tone for consulting, coaching, insurance, and financial services.

Quote/proposal follow-up sequence

TRIGGER: QUOTE SENT TAG

Script 3A Day 1

Hi [first_name], just checking you received our quote for [service/job type]. Happy to answer any questions or adjust anything just reply here.

Script 3B Day 3

Hi [first_name], I wanted to follow up on the quote we sent through. Availability for [service] is limited. Let me know if you'd like to go ahead.

Note: Soft urgency. Only use if availability is genuinely constrained.

Script 3C Day 7 (final)

Hi [first_name], this is our last follow-up. If the timing isn't right, no worries, feel free to reach out when you're ready. [business_name]

Note: Permission to disengage. Often gets more replies than earlier follow-ups.

Review request (post-job / post-sale)

TRIGGER: JOB COMPLETE TAG

Script 4A SMS (preferred)

Hi [first_name], thanks for choosing [business_name]! If you have 60 seconds, a Google review would mean a lot: [review_link]

Note: Send 24 hours after the job is marked complete. Response drops sharply after 72 hours.

Script 4B Email (3-day follow-up)

Subject: A quick favour, [first_name] | Hi [first_name], thanks again for working with us. If you had a good experience, a Google review helps other customers find us: [review_link]

Client onboarding (agency's own new clients)

TRIGGER: CLOSED WON STAGE

Script 5A Welcome SMS (Day 1)

Hi [first_name], welcome to [agency_name]! Really glad to have you on board. I'll send through onboarding details shortly. Feel free to reply here with any questions.

Note: Personal tone from rep, not from brand. Sets a collaborative relationship from day one.

Script 5B Onboarding email (Day 1)

Subject: Welcome to [agency_name], your onboarding steps | Hi [first_name], welcome aboard. Here's what happens next: 1. Your onboarding call is booked for [date/time] [calendar_link] to reschedule. 2. Your system will be ready to review by [date]. 3. Login details arrive in a separate email within 24 hours. Reply here if anything comes up before then.

Note: Structured, expectation-setting. Reduces client anxiety, which reduces churn.

GHL custom values: replace all [bracketed fields] with GHL's custom value syntax. Set custom values in Settings → Custom Values before activating any workflow.

5 30-Day Agency Launch Sequence

The exact setup order to go from GHL trial to the first client onboarded in 30 days.

Follow this sequence in order. Don't skip ahead; each step builds on the last. Amber rows are time-sensitive: delays here push back your entire launch timeline.

Day	Task	Why it matters
1	**Enable Missed Call Text Back**	Takes 3 minutes. Immediately works on your own agency enquiries while you build the rest.
1	**Register A2P 10DLC (US SMS)**	1–2-week approval. Start today so SMS is live by Week 2.
1	**Connect your domain**	Required for white-label funnels and pages to show your brand URL.
1–2	**Configure email sending domain (DMARC/DKIM/SPF)**	DNS propagation takes 24–48 hours. Set now so email deliverability is clean by Day 3.
2	**Build your agency sub-account**	Your own business in GHL CRM, pipeline, and automations for your own prospect management.
2–3	**Set up your agency pipeline (7 stages)**	Tracks your own new business. Covered in Section 3 of this guide.
3	**Build Snapshot 1 (primary vertical)**	Start with the industry you know best. Test every automation on a real contact first.
3–4	**Test the full Snapshot end-to-end**	Submit a test form. Confirm that every automation fires. Fix anything broken before the client uses it.
4	**Build Snapshot 2 (second vertical)**	Two working Snapshots = two client types you can onboard immediately.
5	**Set up white-label branding (Unlimited plan)**	Agency Settings → White Label. Your logo, colours, and domain on the client dashboard.
7	**Onboard the first client**	Deploy Snapshot → customise with client details → test → go live. Target: under 45 minutes.
7–14	**Build Snapshots 3 and 4**	Expand your serviceable verticals while client 1 is running.
14	**Activate your own review automation**	Review requests should run on your agency, too, not just for clients.
14–21	**Onboard second and third clients**	Each one should take under 45 minutes now.
21	**Build Snapshot 5**	Five Snapshots = five serviceable verticals = broad new business capability.
21–30	**Optimise based on real data**	Review automation trigger rates, pipeline conversion, and client feedback. Improve one thing per week.
30	**Evaluate: Starter or Unlimited?**	Starter ($97): 3 sub-accounts. Unlimited ($297): agencies with multiple clients.

The agencies that get the best results from GHL are the ones that invested Week 1 in setup, not scattered across the first month. Block time in your calendar for Days 1–7 before you start your trial.

START YOUR FREE TRIAL

Start your free trial for 30 days, not the standard 14

Everything in this guide is built inside GoHighLevel. The standard trial is 14 days. This link gives you 30 enough time to deploy two Snapshots, onboard a real client, and know whether GHL fits your agency before you pay anything.

→ Claim your 30-day free trial at gerahilan.com

No credit card required during the trial. Cancel before day 30, and you pay nothing.