anicca digital

A Step-by-Step Guide to Marketing and Sales Automation using Go High Level
By Ann Stanley – Founder & CEO of Anicca Digital

Contents

1. Introduction to Go High Level and Marketing Automation

Welcome to this comprehensive guide on **Go High Level (GHL)**, the platform that's changing the way businesses manage their marketing and sales processes.

I am Ann Stanley, Founder and CEO of **Anicca Digital**, and this is a writeup of a workshop that I presented in November 2024, with my colleague Jess Loizou, to walk through the capabilities of this powerful tool.

For businesses today, managing multiple tools to nurture leads, run campaigns, and close sales is often time-consuming and inefficient. Teams frequently deal with disconnected data, missed opportunities, and difficulty keeping marketing and sales aligned.

That's where GHL comes in. As a complete **marketing automation and CRM platform**, GHL integrates everything into one system. From lead tracking to customer retention, it ensures no opportunity is missed, helping businesses work smarter, not harder.

2. Understanding Sales and Marketing Funnels

To understand how GHL supports businesses, let's start with the basics – the **sales and marketing funnel**. However, the terminology is very different for these two disciplines (see the diagram below). The **sales funnel** represents the customer journey, divided into three key stages:

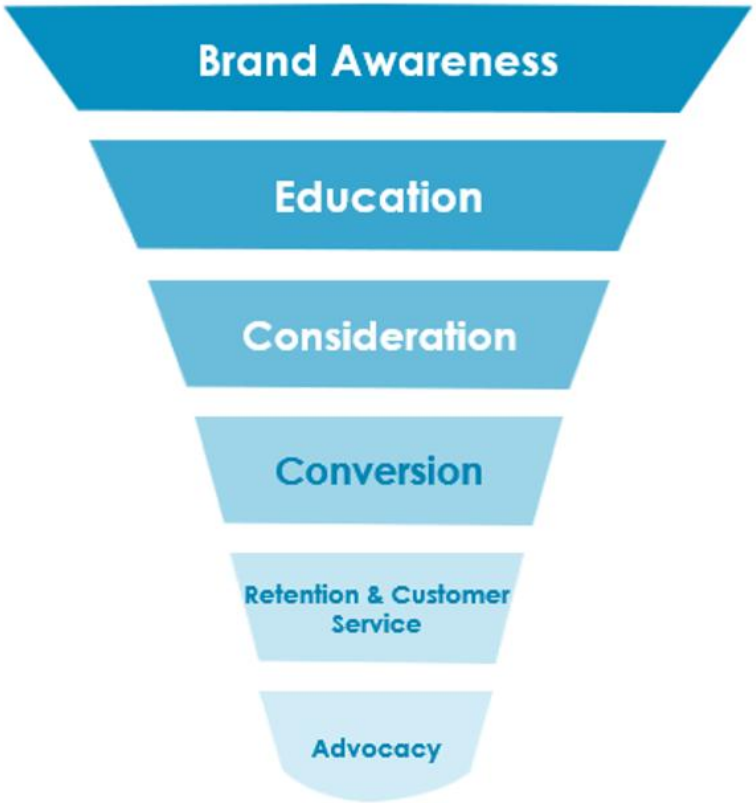
- **Top of Funnel (TOFU):** Creating **awareness** and attracting potential customers.
- **Middle of Funnel (MOFU):** Building trust and helping prospects **consider** their options.
- **Bottom of Funnel (BOFU):** Encouraging **conversions** and maintaining customer loyalty, through customer **retention** tactics.

Marketing teams use **Outbound strategies** like Awareness at the TOFU stage and Consideration at the MOFU stages, for example, using social media, display, content, webinars, and emails to educate and nurture leads.

Whereas **Inbound strategies** like paid search, affiliate marketing and shopping are used for the Conversion stage of the marketing funnel. This is also where the Sales teams, often focus, i.e. the BOFU, where they take the leads generated by Marketing, or they will create their own prospect leads, using outreach tactics like sales calls and LinkedIn. They will then qualify and nurture these prospects until they close or win the opportunity.

When these stages are integrated effectively, you create a seamless customer experience. GHL simplifies this integration, ensuring that marketing and sales efforts align to move leads smoothly through the funnel.

Marketing vs sales funnels (differences in terminology)



Marketing funnel

TOFU –
Top of Funnel

MOFU –
Middle of Funnel

BOFU –
Bottom of Funnel

Sales funnel

3. Marketing vs. Sales: Bridging the Gap

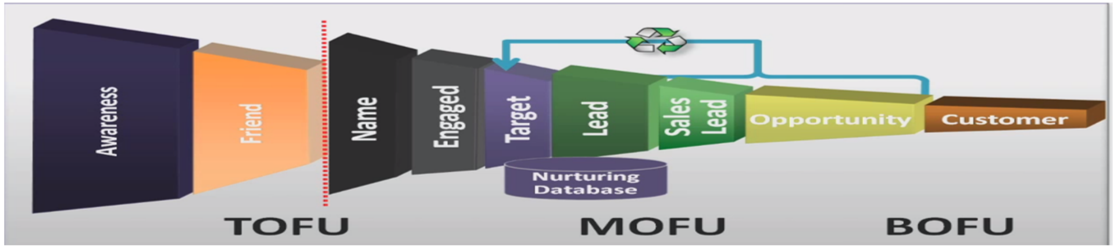
Marketing and sales teams often work in silos, which can lead to disconnects and inefficiencies. Marketing focuses on visibility and engagement, while sales handles qualification and conversion. But what happens in between?

This is where **Go High Level bridges the gap**. It unifies marketing and sales efforts on one platform, allowing teams to:

1. **Track leads from start to finish:** Marketing teams can nurture leads while sales teams access the same data to qualify and close them.
2. **Work with a shared view of the customer journey:** GHL offers visibility into all interactions, from website visits to email clicks and form submissions.
3. **Collaborate more effectively:** With clear data and tools, both teams can align their strategies, ensuring no opportunities are missed.

For businesses, particularly those with longer sales cycles, this integration is crucial. GHL doesn't just connect teams – it helps them work as one.

Role of marketing & sales teams in the sales funnel



Role of marketing	**Visibility, awareness and traffic**	**Establishing credibility & nurturing**	**Ongoing customer education & advocacy**	
Role of sales		**Qualifying prospect Establishing needs**	**Convincing & converting**	**Upsell & cross-sell**
Software & techniques	**Advertising & marketing channels**	**Content email & remarketing**	**Customer email**	
		Customer relationship management (CRM)		

4. The Evolution of CRM and Marketing Automation Tools

Over the years, businesses have relied on **standalone tools** to manage different parts of their marketing and sales processes. From CRMs that track customers to email software for nurturing leads, these tools worked well individually but often didn't communicate with each other. The result? Disconnected data, manual workarounds, and missed insights.

Platforms like GHL represent the next step – **integrated marketing automation software (MAS)**. GHL combines the power of CRM, email marketing, lead tracking, and analytics in a single system. This means businesses can:

- Manage the entire customer journey, from the first interaction to customer retention.
- Automate repetitive tasks, saving time and reducing errors.
- Gain actionable insights through unified reporting.

With GHL, you don't just streamline processes – you gain a complete view of your business, helping you make smarter decisions.

5. Naming Conventions and Lead Tracking with GHL

Understanding how leads progress through the funnel is key to effective marketing and sales. The following naming convention is useful to understand how we track visitors and prospects through this journey:

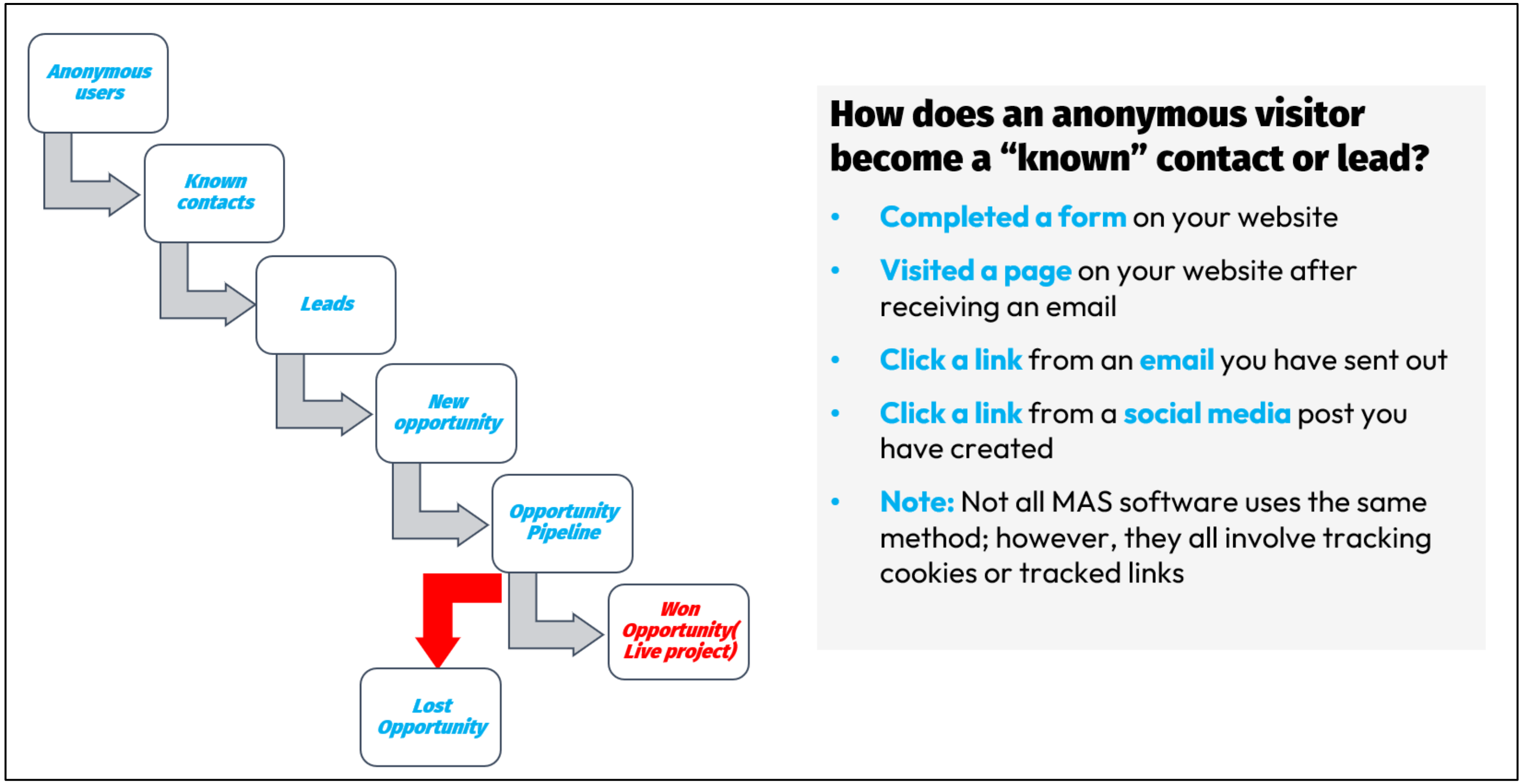
- **Anonymous Users:** Visitors who browse your site but haven't identified themselves.
- **Known Contacts:** Visitors who fill out a form, click a tracked link, or engage with your content.
- **Leads:** Contacts showing interest in your offerings.
- **Opportunities:** Qualified leads ready to enter your sales pipeline,
- **Stages in the Sales Pipeline:** We label Opportunities using different Pipeline stages, to track where the prospect is in the sales process.
- **Won Opportunities:** Leads converted into paying customers.

GHL tracks every stage automatically, using tools like:

- **Web Forms:** Forms integrated into your site feed data directly into GHL.
- **Cookies and Links:** Track behaviour across web interactions and emails.
- **Social Media Tracking:** Some integrations allow tracking clicks and comments.

By tracking these interactions, GHL ensures that no lead slips through the cracks.

Naming conventions



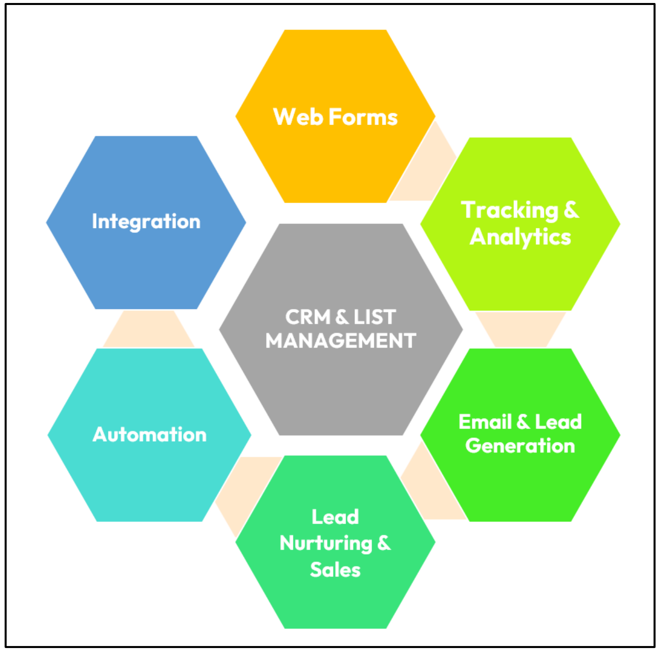
6. Features of Marketing Automation Software (MAS)

At its core, **Go High Level** offers everything you need in a **marketing automation platform**. Key features include:

1. **CRM and List Management:** Organise and segment contacts with ease.
2. **Web Forms and Lead Tracking:** Capture data directly from your website and monitor lead behaviour.
3. **Email Marketing and Workflows:** Automate campaigns and nurture leads with personalised sequences.
4. **Reporting and Analytics:** Gain insights into campaign performance and customer behaviour.

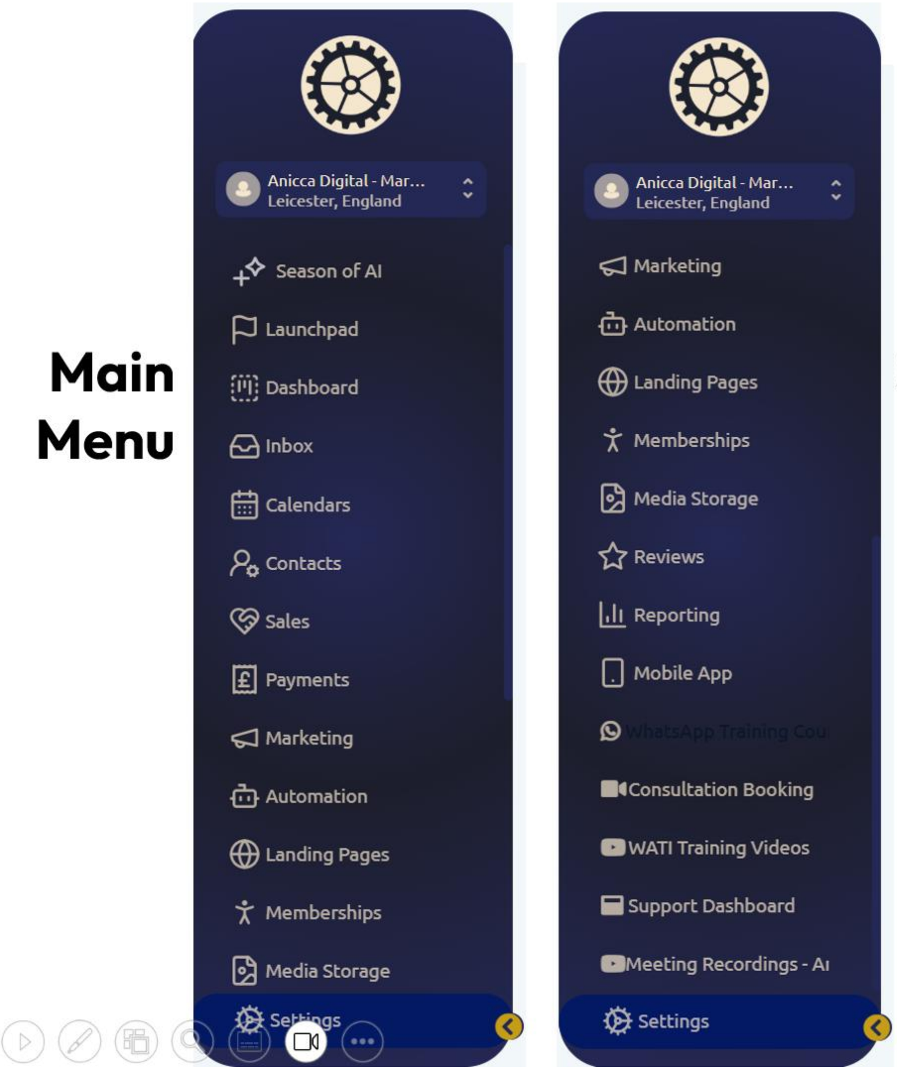
What sets GHL apart is how seamlessly these features work together. It's not just a collection of tools – it's a unified system that saves time, improves accuracy, and drives results.

Key parts of marketing automation software

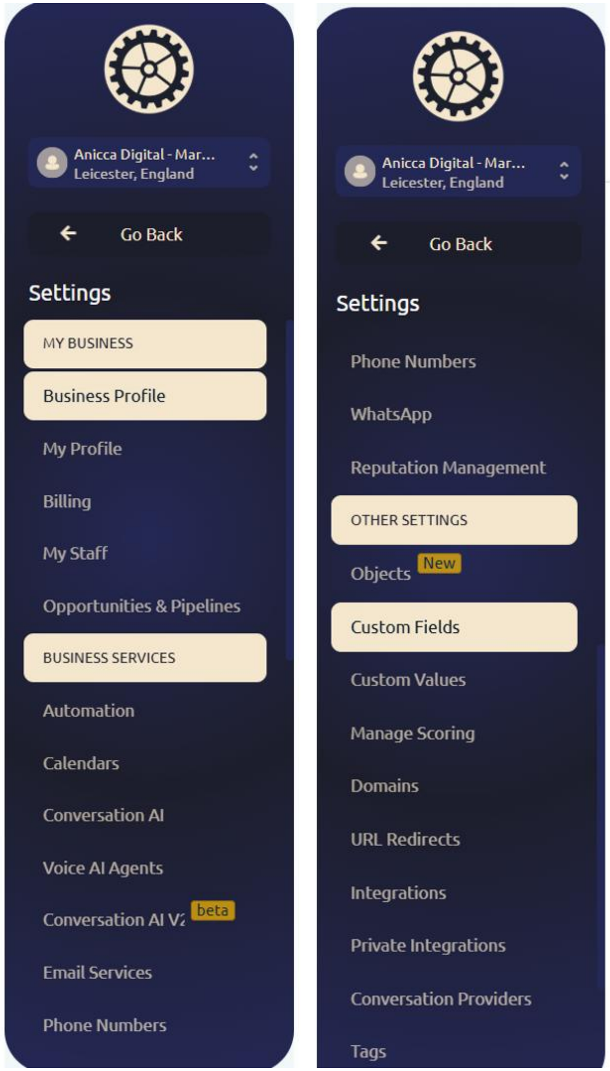


Overview of GHL menu – showing different elements of the software

Main Menu



Settings Menu



7. Initial Setup of GHL for Marketing Automation

Getting started with GHL is straightforward. Here are the key steps:

Account set-up

- Customise **account settings** e.g. for location.
- **Tag website** with relevant tracking code
- Set-up **staff users** and profiles
- Use **API Connectors** to link to other software e.g. Gmail/Outlook, Calendars, Google Ads, Facebook ads, WhatsApp, Payment gateways.

Customise Settings

- Upload your **logos and branding**
- Create **Opportunity stages** (for the sales pipeline)
- Set up campaigns (**where did you hear about** us?)
- Link **Social Profiles** e.g. Twitter, LinkedIn (if applicable)

Data collection

- Create custom fields
- Create website forms
- Import lists (via CSV), map field names

Once everything is in place, you'll have a system that works behind the scenes to track, manage, and engage your leads, leaving you free to focus on strategy.

8. Using Go High Level for Marketing Automation – Demonstration of the software in action

8.1 Contacts and List Management

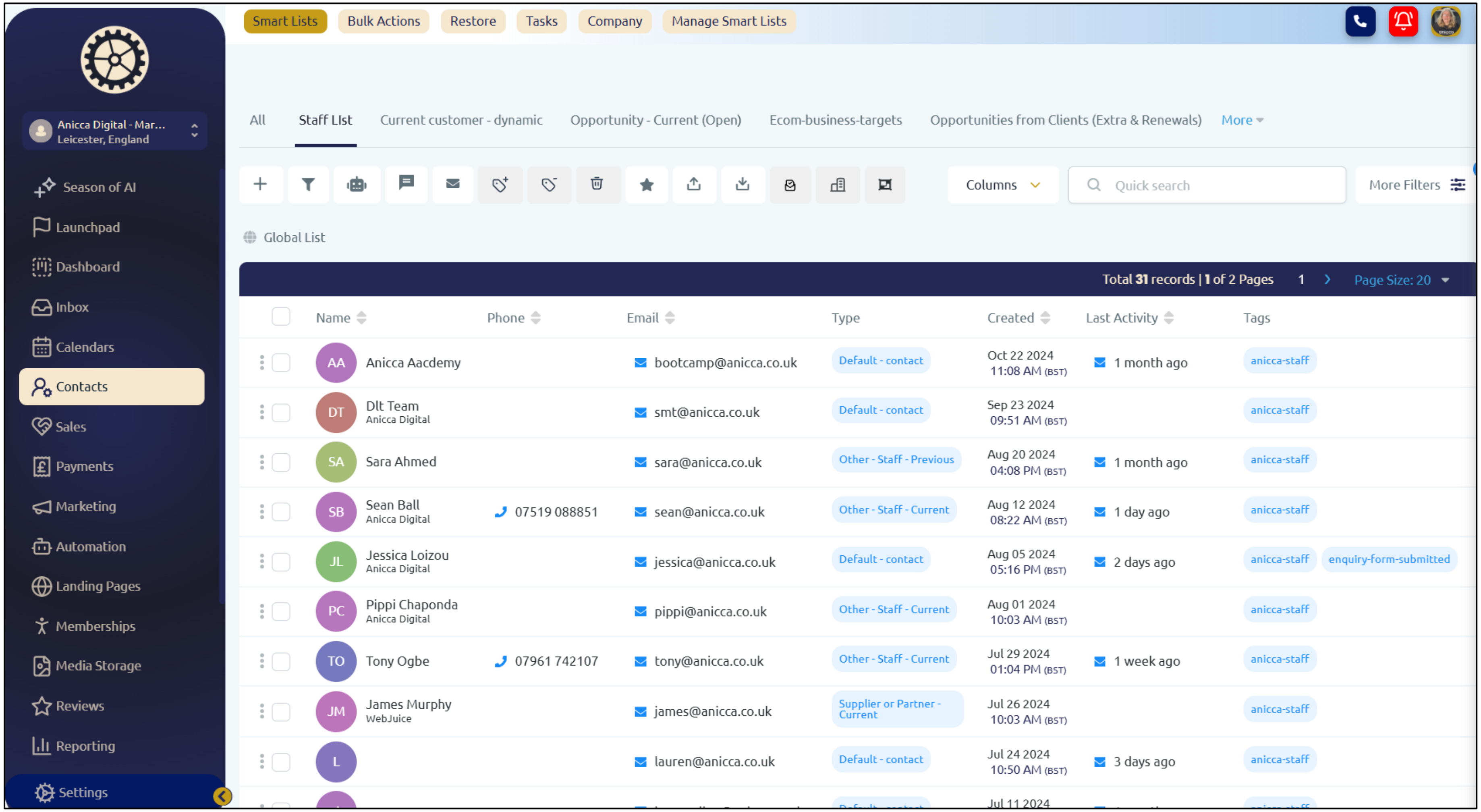
Managing Contact Lists in Go High Level
Contact lists are the backbone of your marketing and sales activities in Go High Level. During the demonstration, I highlighted how versatile these lists are and the range of actions you can perform to organise and manage your contacts effectively.

1. Viewing and Navigating Contact Lists

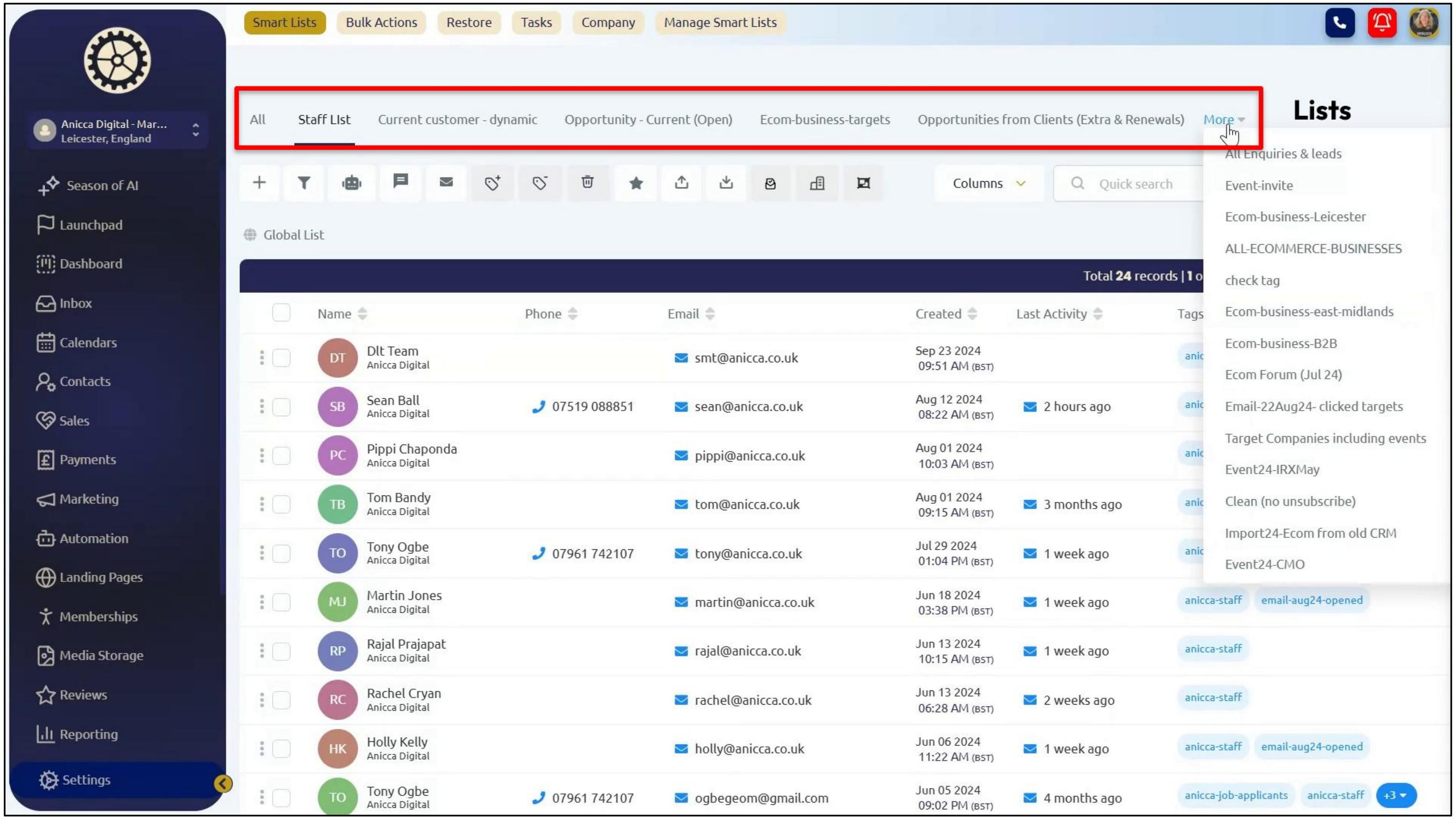
GHL provides a clear and customisable view of your contacts:

- **Smart Lists:** These are dynamic lists you create based on specific filters or tags. Examples might include "Current Customers," "Ecommerce Opportunities," or even event-specific lists like "Webinar Attendees."
- **Flexible Display Options:** You can choose how many records to display per page, such as 20, 50, or 100, and quickly navigate between them. This flexibility makes it easier to review large datasets. You can also add extra columns, so you can see relevant data for all your contacts in each list. When you save the list, this data is retained, so you can view or export it very easily.
- **Highlighting and Selecting Contacts:** Whether you're working with a single contact or selecting an entire list, GHL lets you perform bulk actions seamlessly.

Contact Screen – with lists of contacts



Smart List - Lists of contacts based on filtered contacts

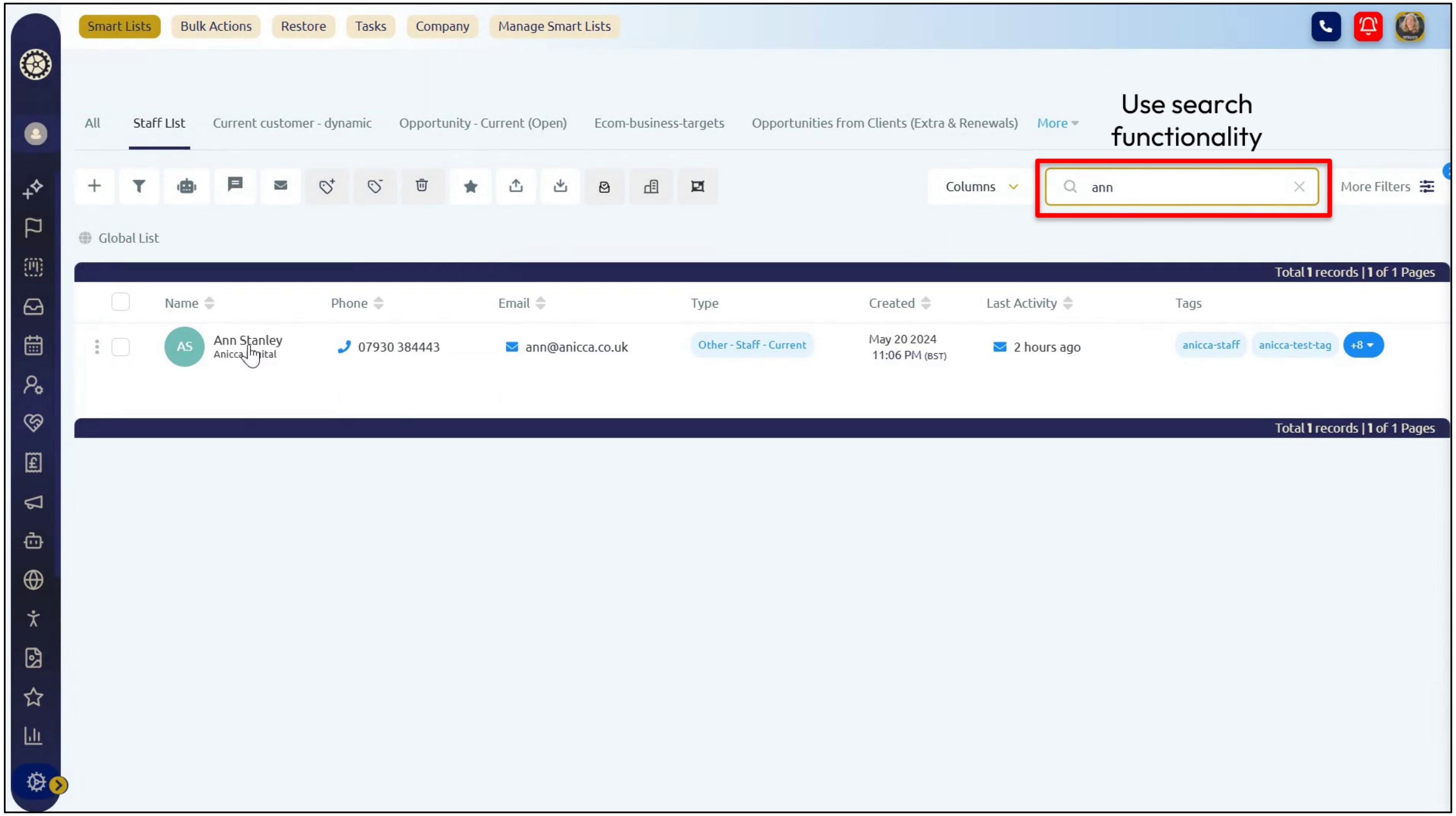


2. Actions You Can Perform on Lists

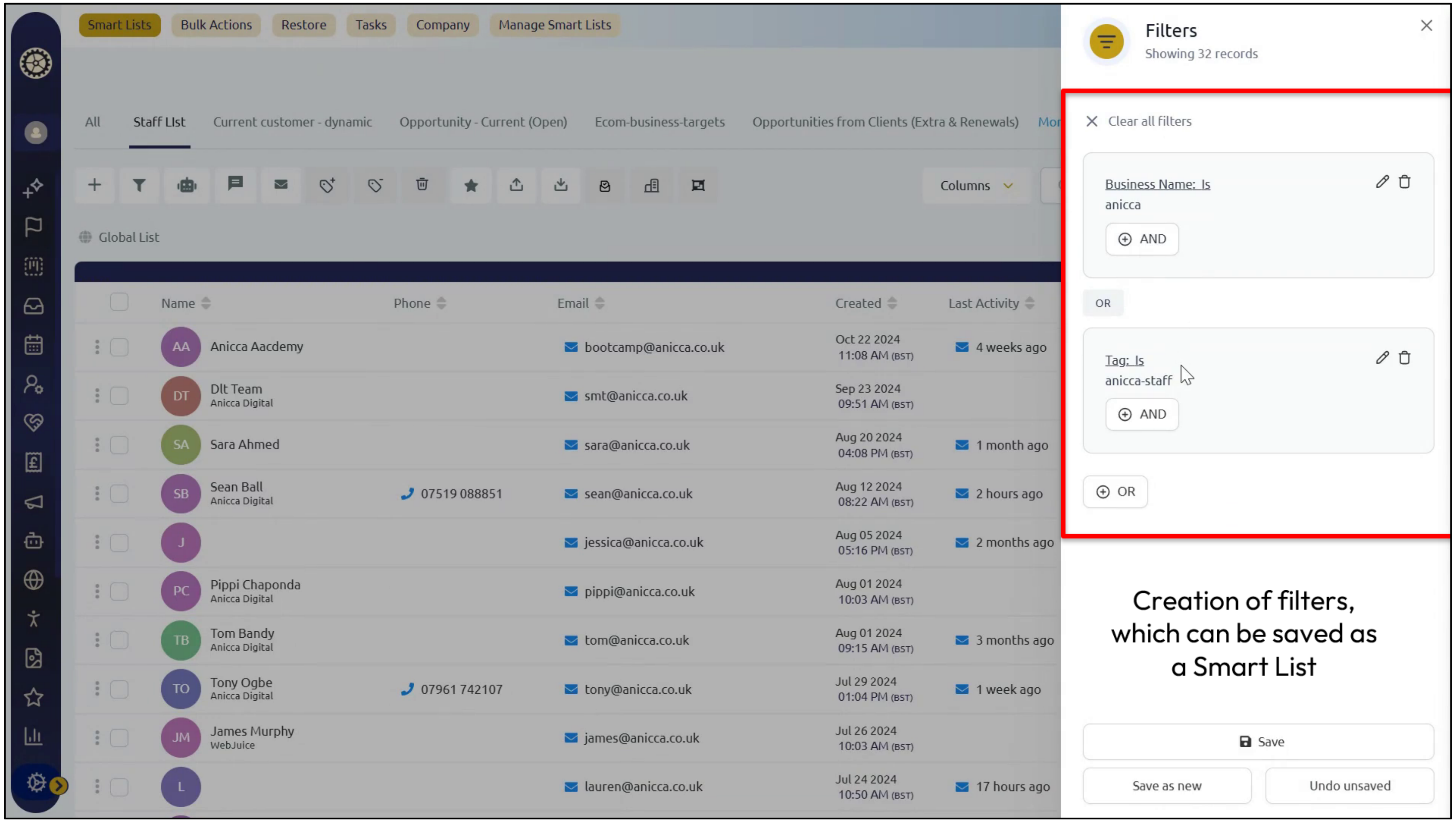
Go High Level offers a variety of tools to interact with and manage your lists:

- **Searching and Filtering:** Use filters to create targeted lists based on criteria such as company name, tags, or specific data fields.
- **Saving Filters and Views:** Once you've set up a filter or added specific columns, you can save the list. This ensures that the next time you open it, your settings are retained, saving you time and effort.
- **Tagging Contacts:** Add or update tags to categorise contacts. For instance, you might tag someone as "Staff," "Client," or "Prospect" to keep your database organised.
- **Data Management:**
  - **Import and Export:** Bring in external lists or export data for offline analysis.
  - **Bulk Actions:** Delete outdated contacts, add or remove tags, or add selected contacts to automation sequences (workflows) directly from the list view.
- **Direct Engagement:** While GHL supports emailing directly from the list, there are more advanced options for campaign emails that provide greater flexibility and tracking capabilities.

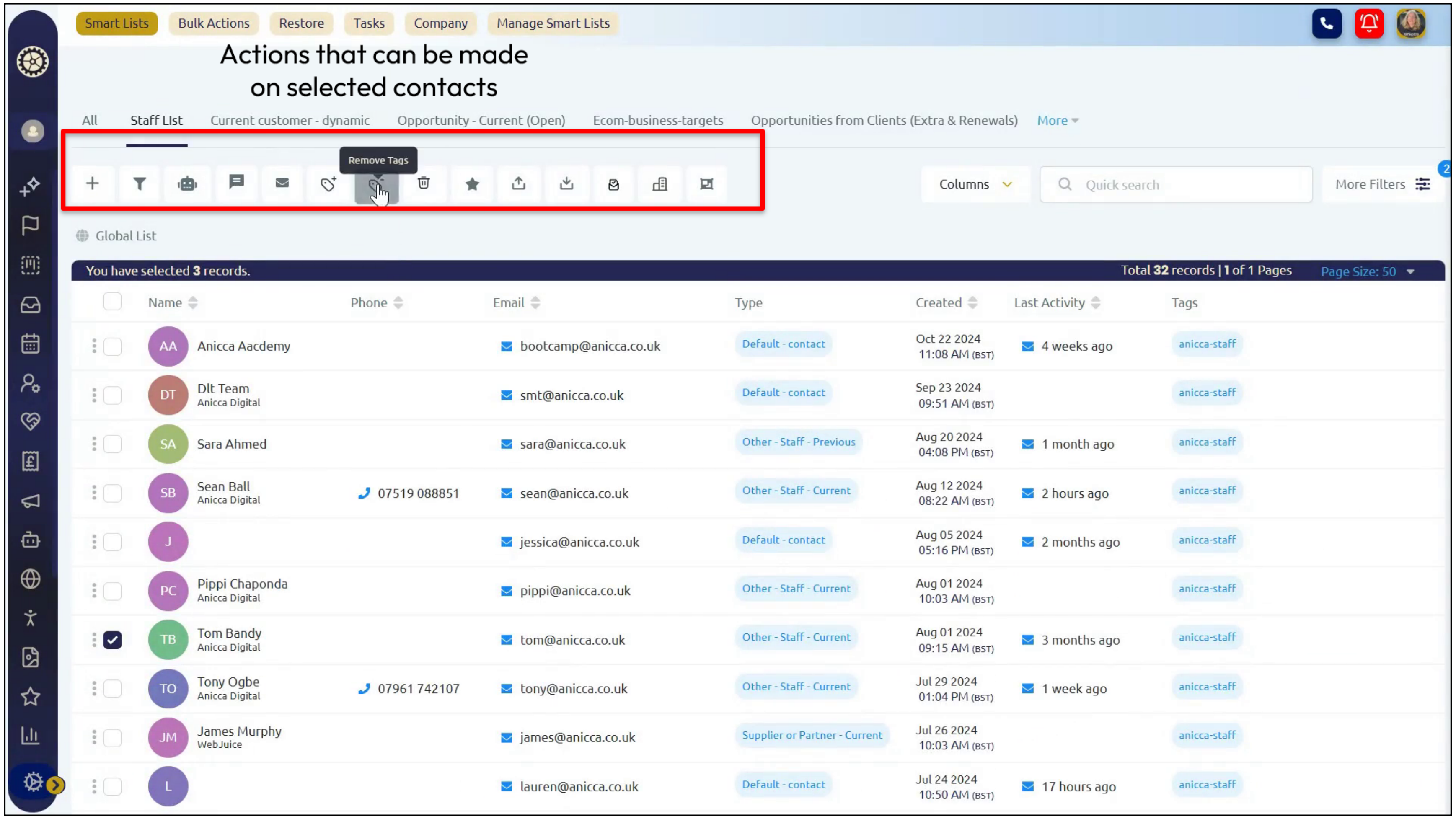
Use of search facility



Use of filters and creation of Smart Lists



Carrying out actions on selected contacts e.g. adding and removing tags

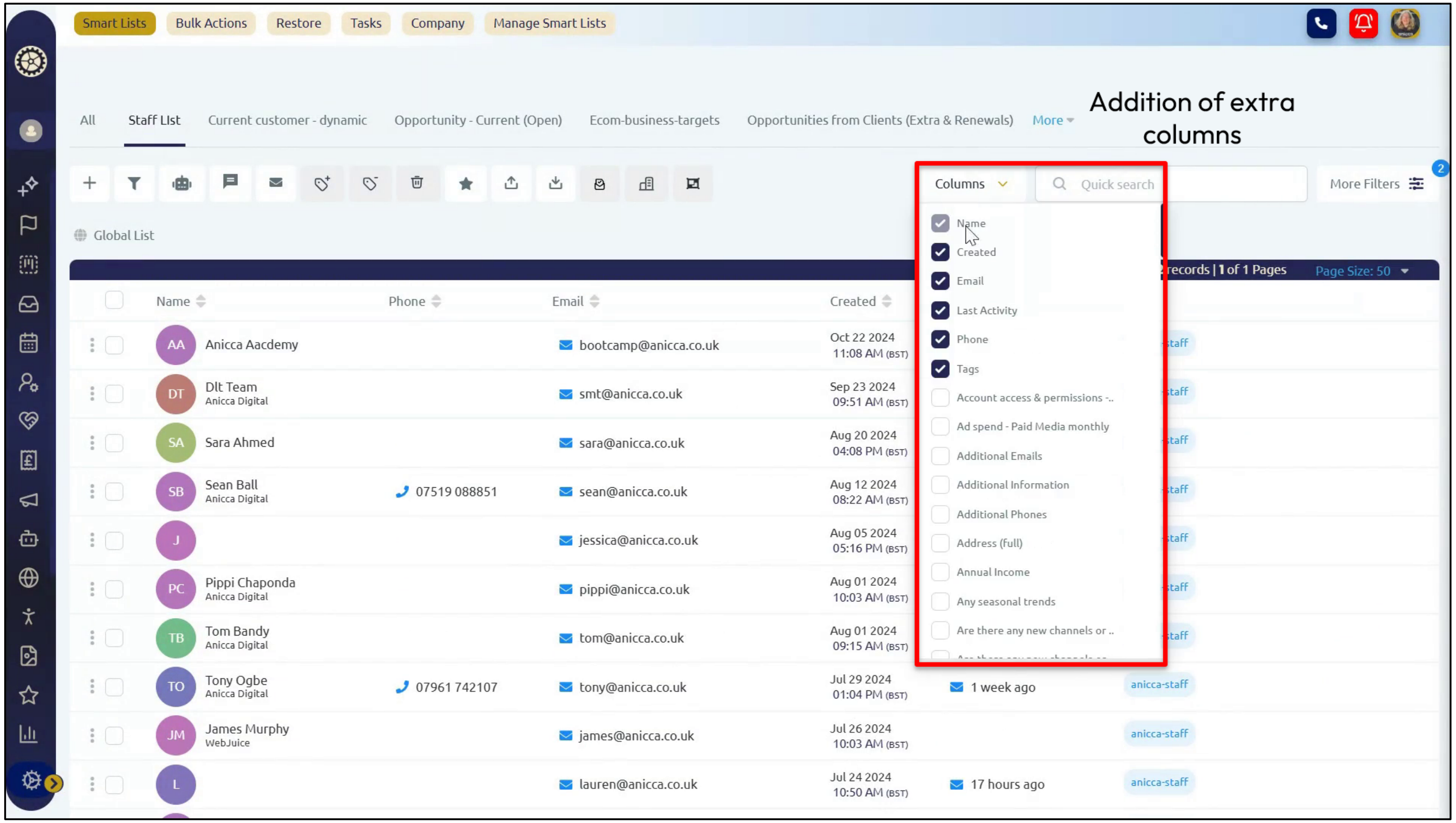


3. Customising List Views

GHL allows you to tailor the information displayed in your lists:

- **Adding Columns:** You can customise your list view by adding columns for data points like "Type" or "Status." For example, if you're managing a staff list, you can display whether contacts are "Active" or "Previous."

Adding additional columns



4. Data Cleaning and Maintenance

Managing a contact database isn't just about adding new leads – it's also about keeping your data clean and accurate:

- **Identifying Incomplete Records:** For instance, contacts imported through appointments might be missing key details like names or company information. GHL makes it easy to identify and update these records.
- **Managing Tags and Statuses:** Contacts no longer relevant to your lists, such as past employees or inactive clients, can be updated or removed. During the demonstration, I showed how to review tags and ensure they reflect the current status of each contact.

5. Practical Example of List Management

In the demo, I showcased how to create a filter for "Anicca Staff" using specific criteria:

1. Apply a filter to find contacts tagged with "Staff."
2. Exclude tags for past employees by adding another filter.
3. Save the list for quick access in the future.

This process ensures your lists stay accurate and up-to-date, providing a reliable foundation for your marketing and sales activities.

8.2 Contact Records: Managing and Customising Contact Data

Beyond managing lists, GHL excels in providing detailed and customisable contact records. During the demonstration, I explored how contact records help you access, organise, and act on individual contact information efficiently.

1. Navigating Contact Records

Each contact in GHL has a dedicated record where all relevant information is stored and displayed:

- **Viewing the Record:** You can open a contact record directly from a Smart List or search result. For example, when reviewing my own record, I accessed not only the general contact information but also custom data fields that I had previously added.
- **Folder Structure for Additional Details:** The contact record includes folders on the left-hand side for categories like General Information, Additional Information, and Project Details. These folders keep your data organised and allow you to customise fields extensively.

2. Adding and Customising Fields

GHL gives you the ability to create new fields and categories tailored to your business needs:

- **Custom Fields:** I demonstrated how to create fields such as "Imported Type," "Main Contact," and even "LinkedIn URLs". These are not default options – they are entirely customisable, helping you track information specific to your business. See image below, showing how I created the fields.
- **Customisable Folder Structure:** When creating custom fields in GHL, you will also specify their grouping by assigning each field to a designated folder. The creation and order of the Folders can also be carried out in the settings.

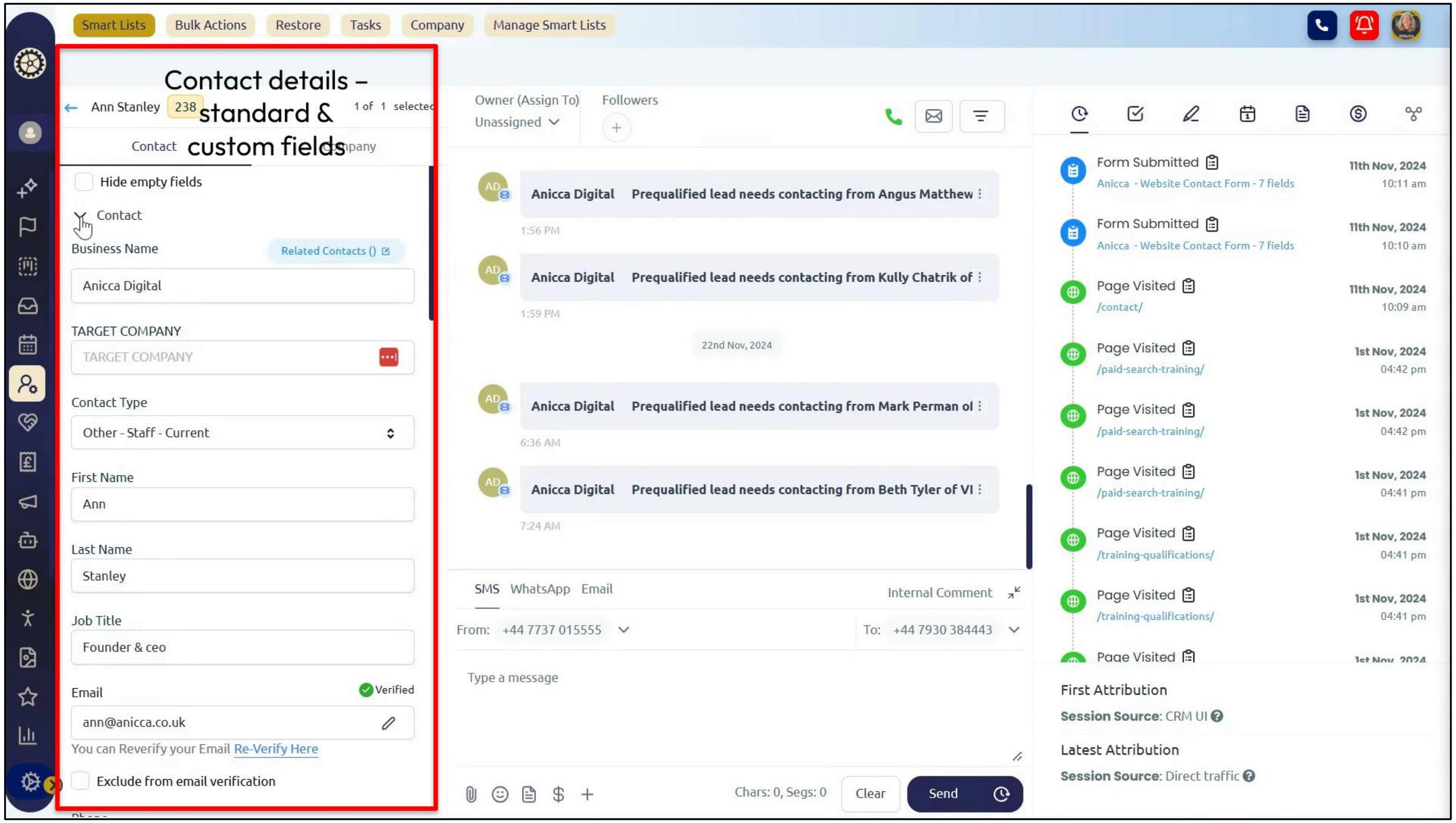
3. Leveraging Tags for Insights

Tags are a dynamic part of contact records, they can also be added or automatically updated when a contact is in an workflow:

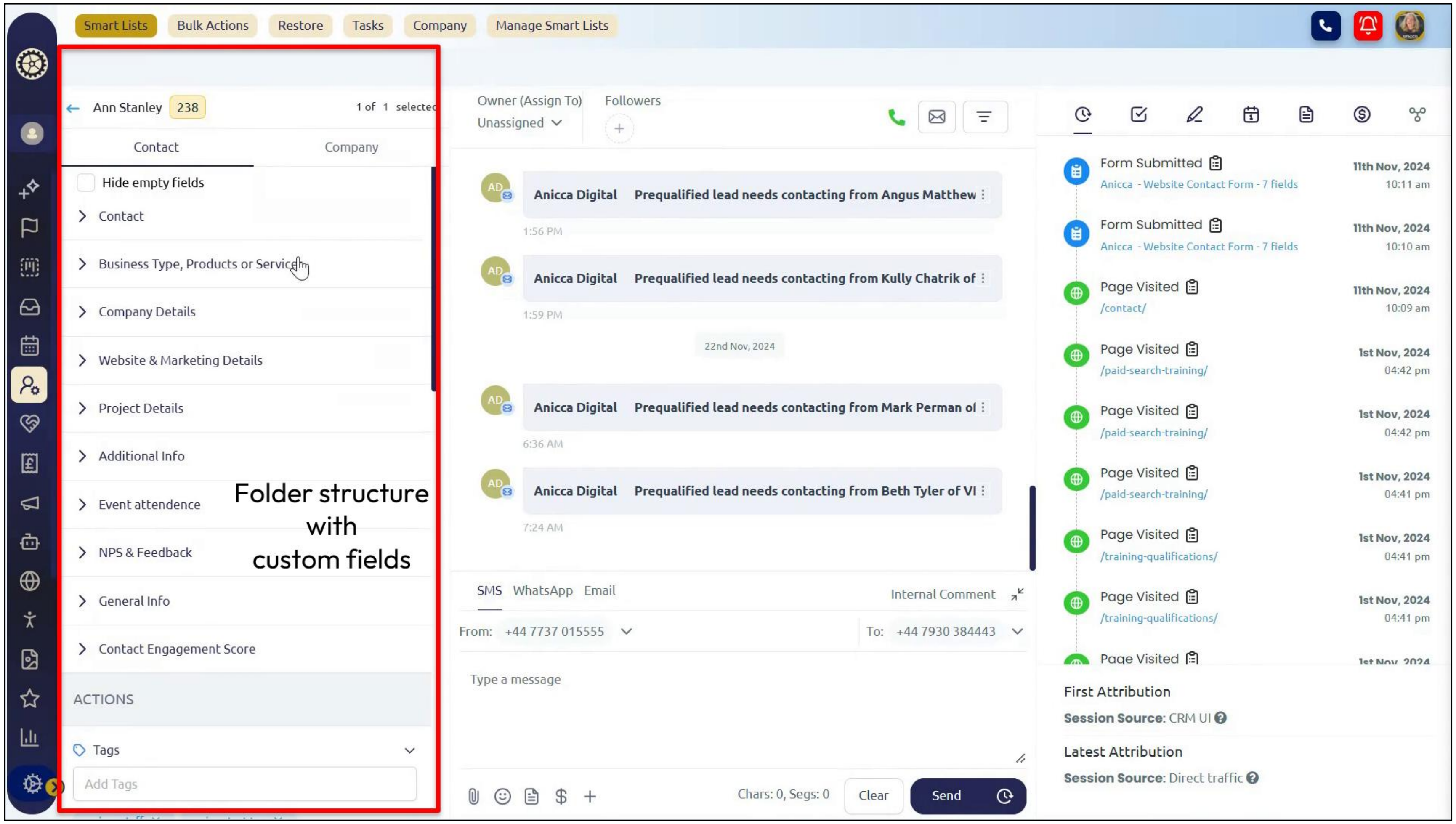
- **Examples of Tags:** During the demo, I showed tags like "Anicca Staff," "Test Tag," and "Inquiry Form Submitted." These tags give you instant insights into a contact's status or actions.

- **Triggering Actions Through Tags:** Tags can also trigger actions, such as adding a contact to a nurturing campaign or marking them as “Prequalified Lead.”

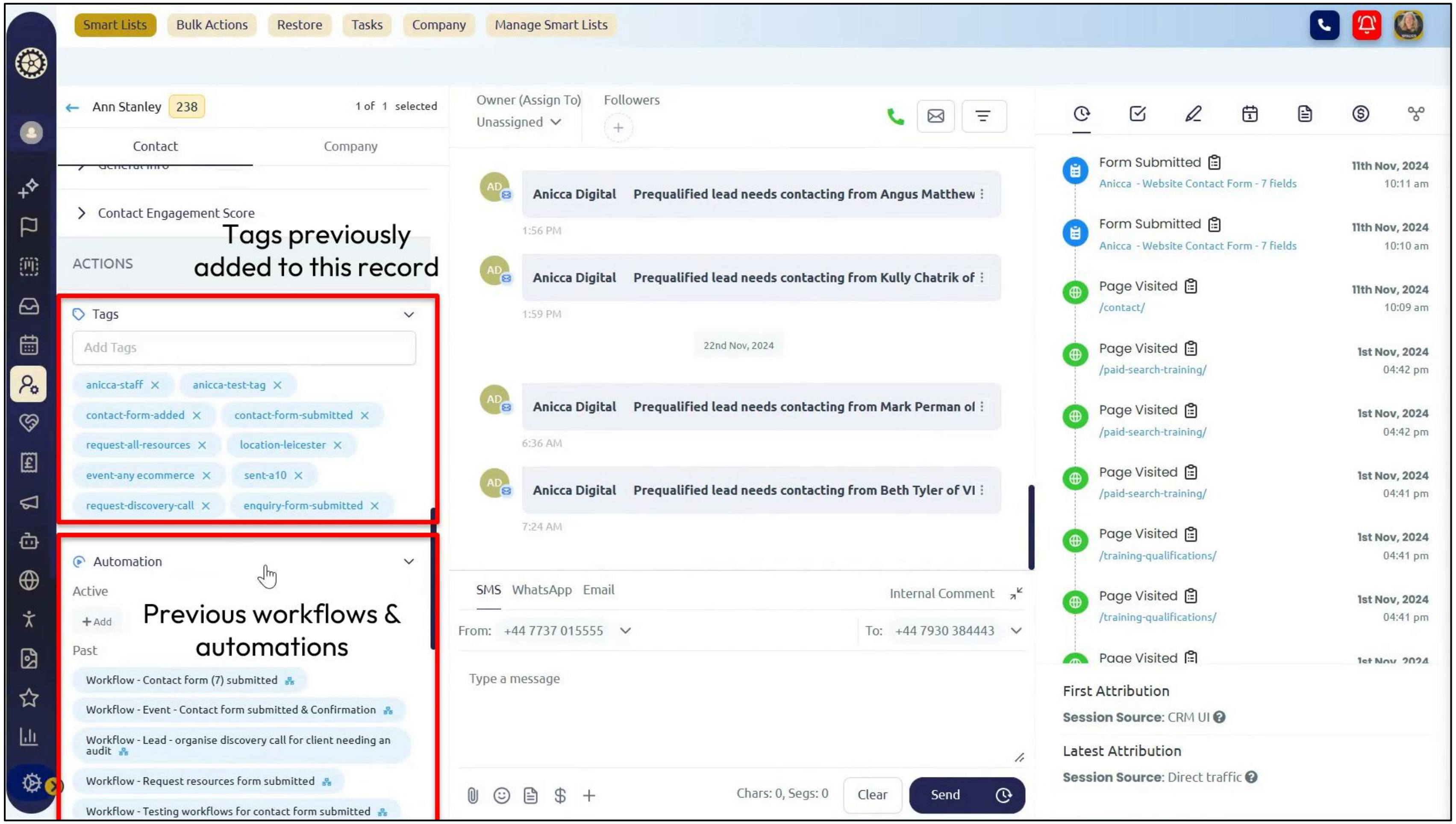
Different parts of the contact record – standard & custom data fields



Folder structure containing custom fields



Previous tags and automations applied to this record

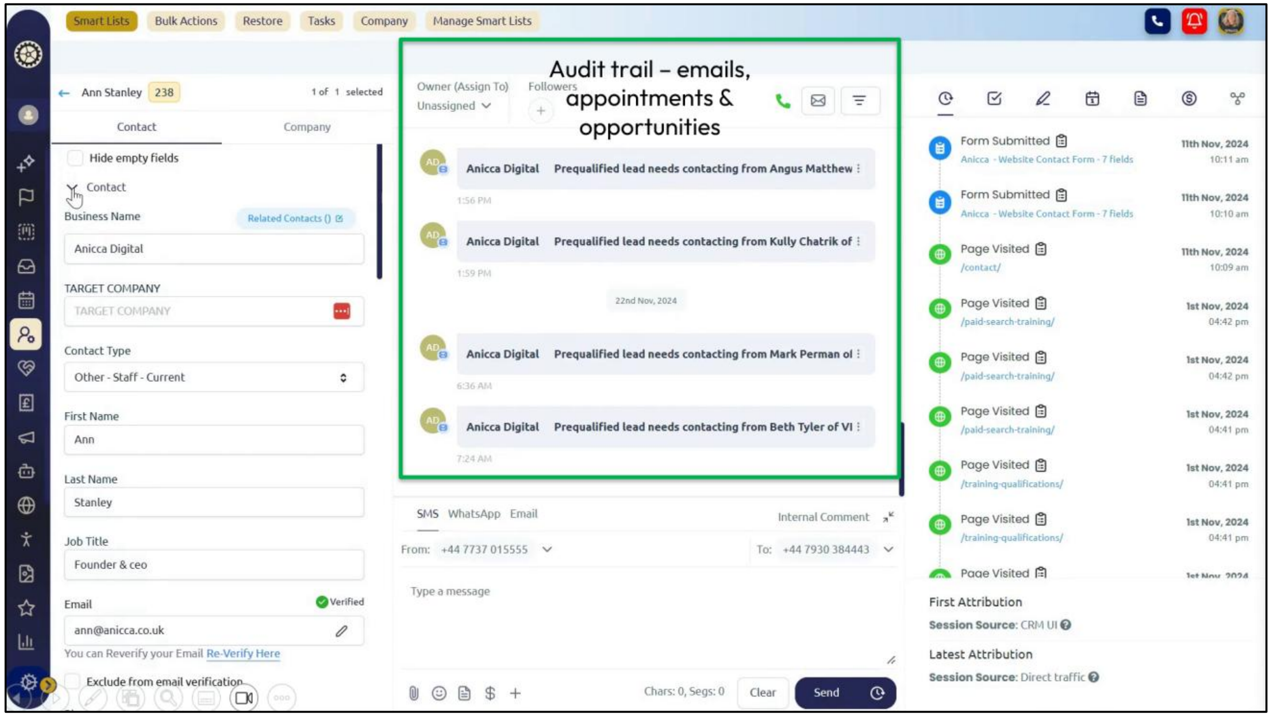


4. Exploring Activity History

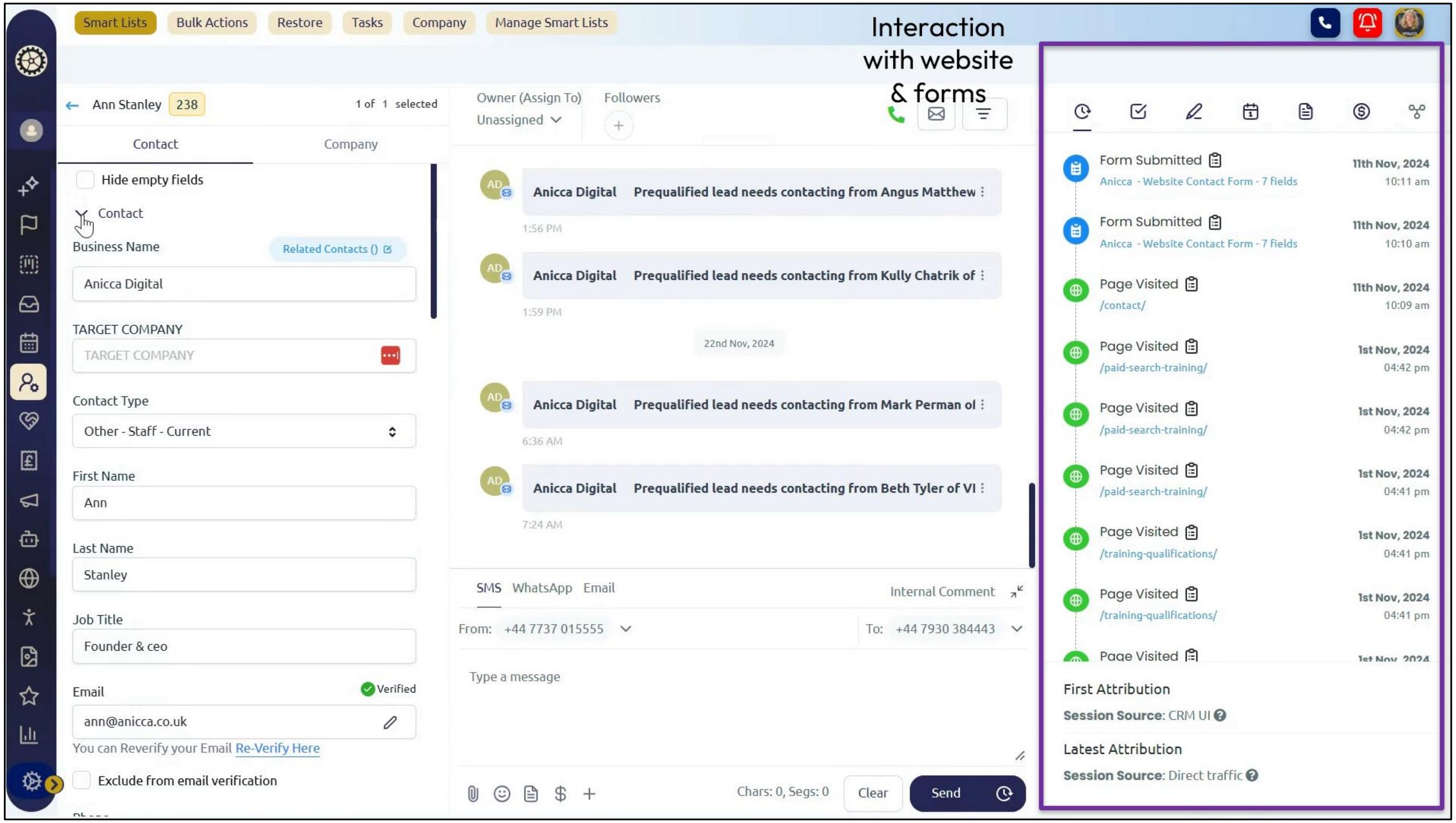
In the top of the middle panel, and the right-hand panel of each contact record, you'll find a detailed activity history:

- **Engagement Timeline:** These 2 panels show interactions such as email opens, form submissions, or website visits.
    - The middle panel shows appointments, emails and opportunities.
    - Using the right-hand panel, you can view the pages which had been visited, the forms submitted, and the source of entry (e.g. organic search or direct traffic).
- **Appointments and Actions:** The record also uses a series of action tabs (top of the right-hand panel) where you can interact with the record, create appointments, tasks, notes, and even payments, giving a complete picture of the relationship with the contact.

Different parts of the contact record – central panel - audit trail of engagements (including emails, appointments and opportunities)



Different parts of the contact record – right-hand panel - audit of site interactions (pages & forms) and action tabs

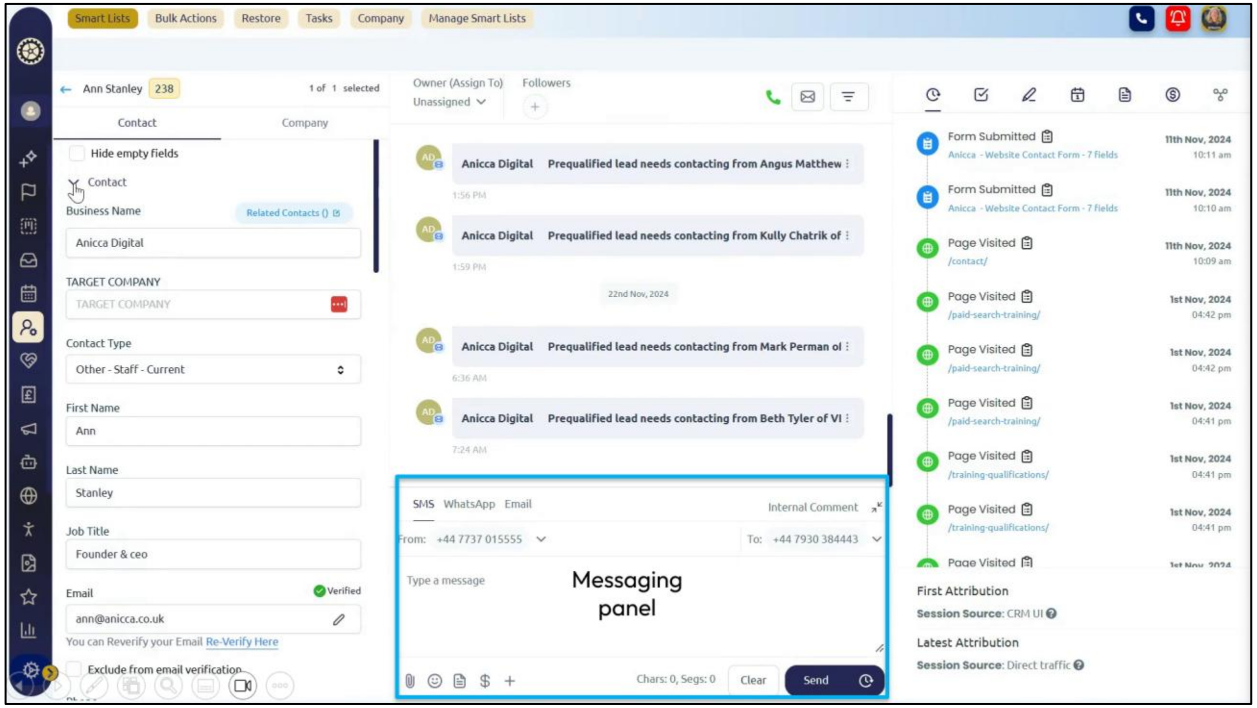


5. Integrating Email and Communication

GHL allows you to manage communication directly from contact records:

- **Email Integration:** Emails can be sent from within the platform, complete with pre-saved snippets and templates. For example, I showed how to use a pre-written snippet for scheduling discovery calls.
- **Email History:** All email and mobile phone conversations are stored in one place and can be easily viewed in the middle panel (top half) of the record. If your GHL account is synced with your work email, emails sent through GHL will show up in your inbox, and emails from your inbox will appear in GHL too, keeping everything connected.

Different parts of the contact record – messaging panel

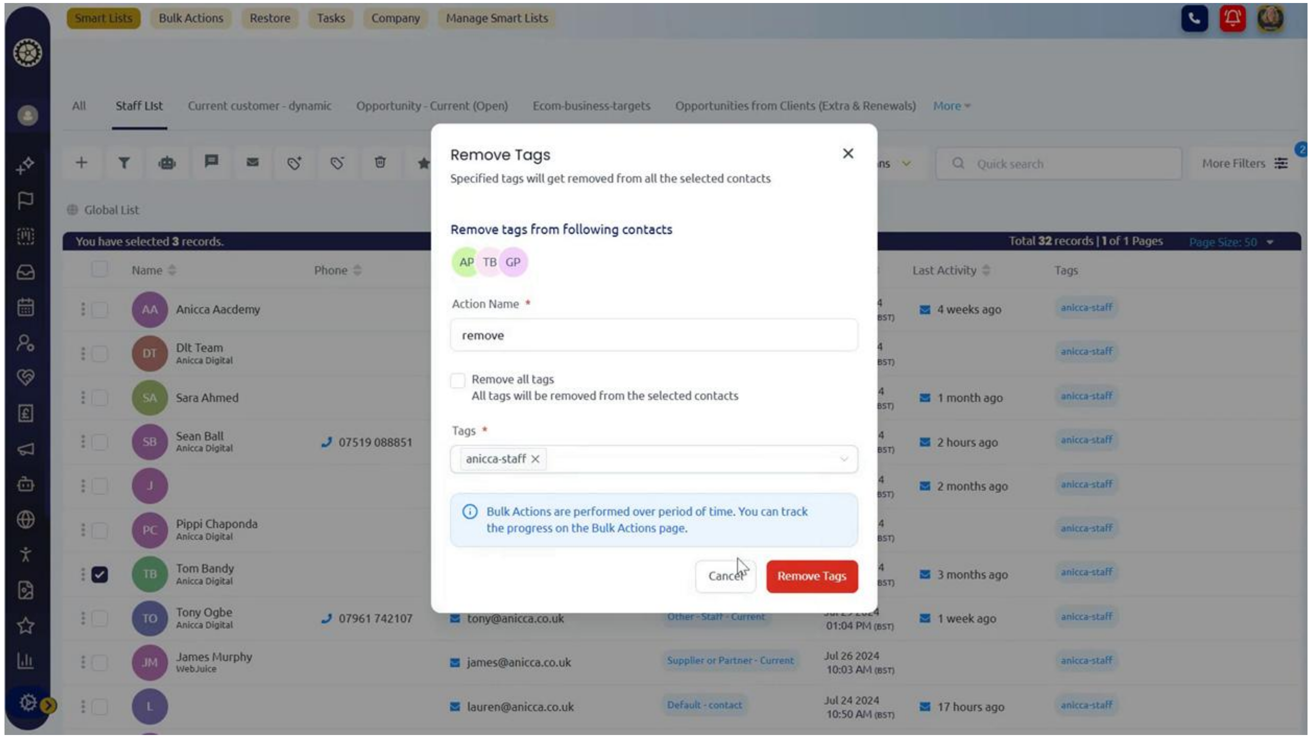


6. Data Updates and Cleaning

Keeping your records accurate is essential:

- **Updating Tags:** I demonstrated updating tags for staff members who had left the company. For example, I added a "Previous Staff" tag while removing the "Current Staff" tag to keep the record clear and accurate.
- **Editing Data Fields:** When errors were identified, such as incomplete or outdated information, I showed how to edit and save changes directly within the record.

Removing tags from selected contacts in a list



7. Practical Example: Automating Record Updates

One powerful feature of GHL is its ability to automate updates to contact records. For example:

- Submitting a form can trigger the creation of an opportunity in the sales pipeline.
- Automations can add or remove tags, ensuring that records remain relevant without manual intervention.

In summary, contact records in Go High Level provide a centralised, customisable hub for all contact-related data. With tools for tagging, tracking activity, and syncing communication, GHL ensures your team has the information they need to make informed decisions quickly.

8.3 Creating Custom Fields and Forms

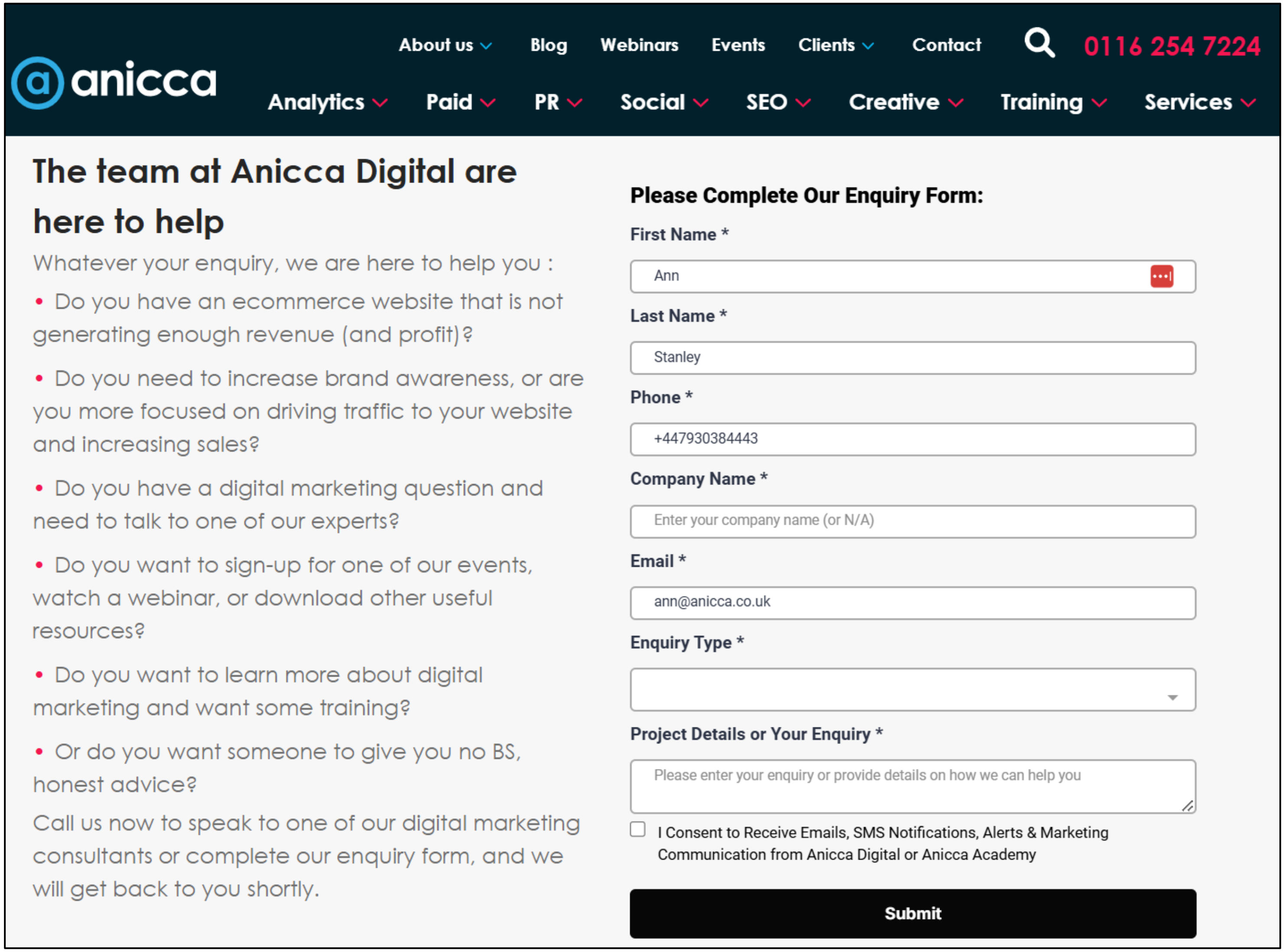
Forms and custom fields are essential components of GHL, providing the flexibility to capture and manage the exact data you need. During the demonstration, I walked through a live example of a website form and showcased how custom fields can enhance your data collection.

1. **Live Form Demonstration**

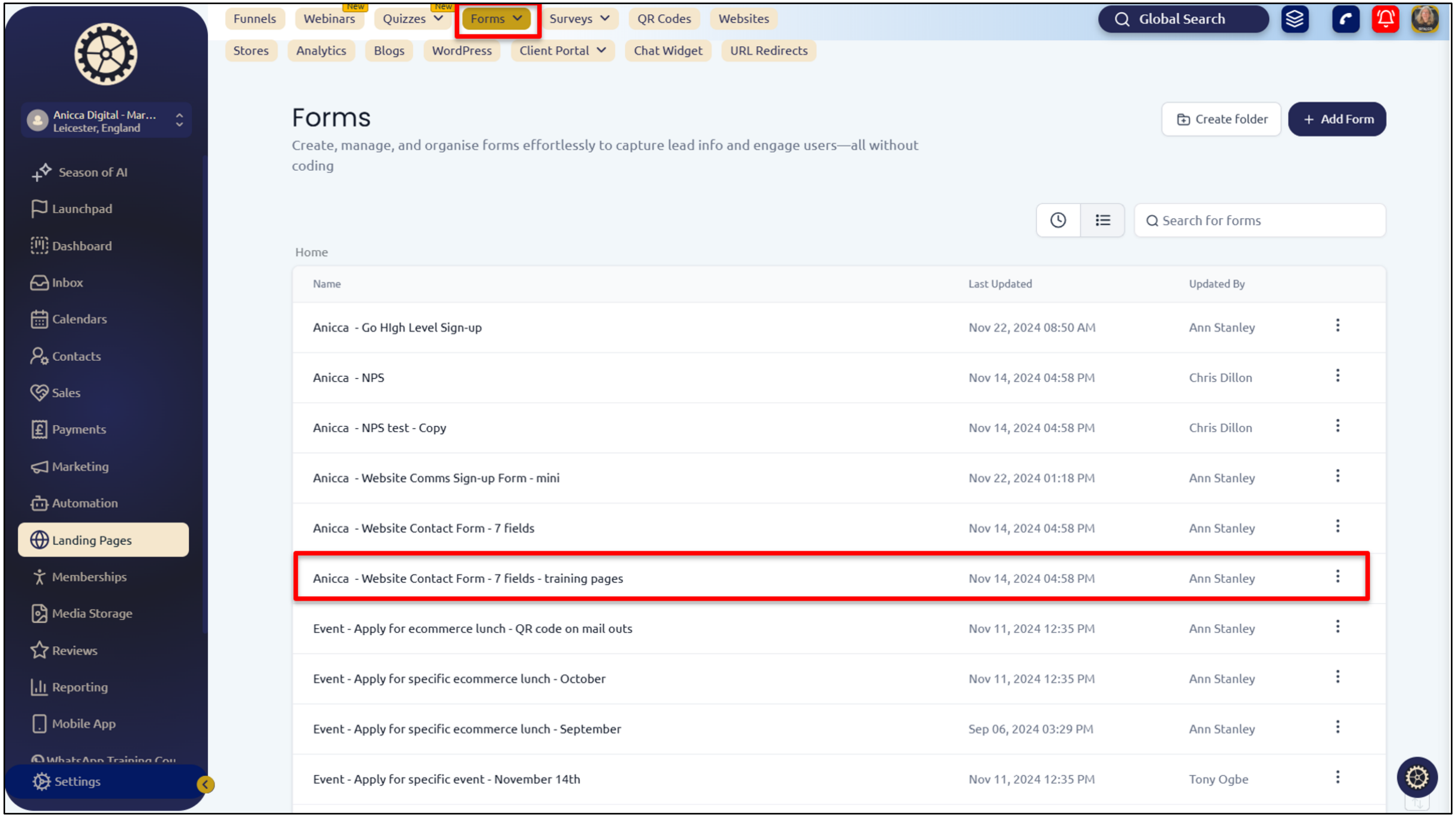
To show how forms integrate seamlessly into your website, I used the contact form from the Anicca Digital website:

- **Sticky Form Functionality:** The form automatically recognised returning visitors, pre-filling details such as my name and email. This ensures a smoother user experience while saving time for repeat visitors.
- **Example Form:** The form included fields for:
    - First Name
    - Last Name
    - Email Address
    - Phone Number
    - Company name
    - A dropdown for “Enquiry Type”
    - A text box for the visitor to describe their enquiry or project details.

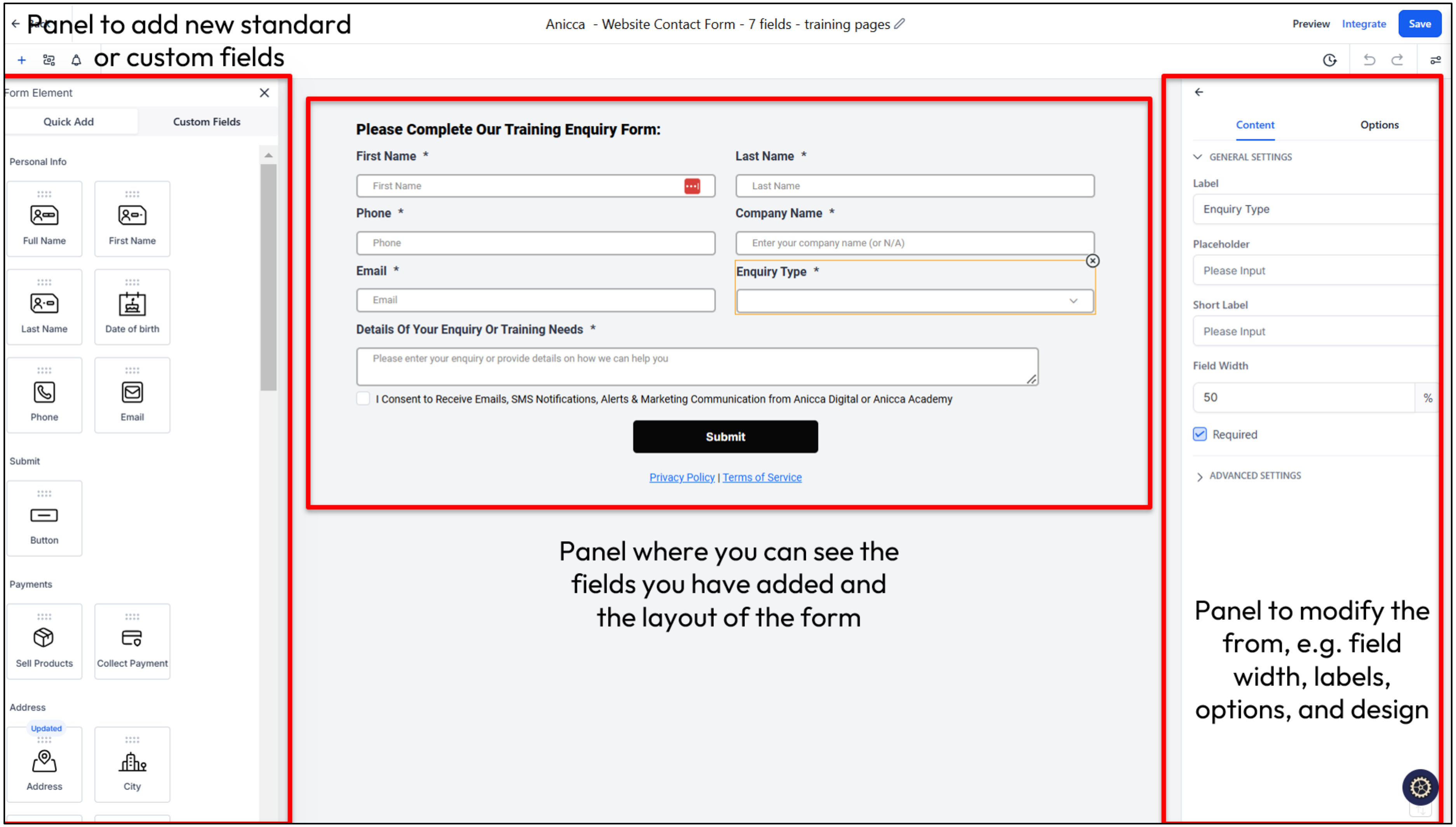
Below is a screen grab of the website form, which was created in GHL and is directly populated whenever it is completed.



The same form in GHL (which can be found in the Landing Page part of the menu)



Editing the form – use of the left panels to add fields to the form in the middle and the right-hand panel to modify the fields & form



2. Building and Customising Forms

The form builder in GHL makes creating and editing forms straightforward with its drag-and-drop interface:

- **Adding Fields to the Form:** I added a "Company Name" field by dragging it from the left panel into the form. To ensure it displayed correctly, I resized it to 100% width using the editing options in the right-hand panel.

- **Preview and Layout Adjustments:** After saving the changes, I previewed the form to check how it looked. When it didn't quite align with expectations, I switched to a single-column layout for a cleaner design and refreshed the preview. The form builder offers flexible layout options, such as single or multi-column designs, which can be adjusted from the top of the right-hand panel.

- **Field Editing:** I demonstrated how to customise a dropdown field by editing its options in the right-hand panel under the "Options" tab. Note that changes to dropdown options apply instantly across the entire site, whereas label changes affect only the specific form being edited.

This functionality ensures forms are customisable, professional-looking, and consistent across your site.

3. Using Custom Fields for Tailored Data Collection

Custom fields can be created either while building a form or from the Settings section in the main menu. These fields let you capture specific information for use in forms or to save data in contact records. (They can also be created to add extra details to Opportunities.) During the demonstration, I showed how to:

- **Create New Fields:** I created a custom “radio-button” field, which was titled “Are you a current client?”.
- **Field Options:** I then created options for this field:
    - Yes, I’m a current client.
    - No, I’m not a client but I’m interested.
    - Not applicable.

4. Managing and Deleting Custom Fields

Keeping your database clean and relevant requires ongoing maintenance of fields:

- **Editing Fields:** Custom fields can be updated at any time to reflect new categories or to fix errors. For instance, I corrected a typo in the field “Are you a current client?” and saved the changes instantly.
- **Deleting Fields:** Fields no longer in use can be deleted or reassigned to a different Folder. I demonstrated this by removing the test field I created during the session.

5. Embedding Forms on Your Website

GHL makes it easy to integrate forms into your website or other marketing material:

- **Embed Codes:** After creating the form, you can generate an “embed code” and add the html code to your website (through the page editor). This is how the sticky contact form on Anicca Digital’s website was implemented.
- **Live Links:** You can also get links for each form. We use this to create a bit.ly link, so we can share the online form in emails or social posts.
- **Live Updates:** Any changes to the form in GHL are immediately reflected on your website, eliminating the need for manual updates.

8.4 Calendar and Email Functionality

Integrating calendars and email accounts into GHL creates a seamless system for managing appointments, communications, and team workflows. During the demonstration, I highlighted how these features work together to simplify scheduling and ensure consistent communication.

1. Calendar Integration

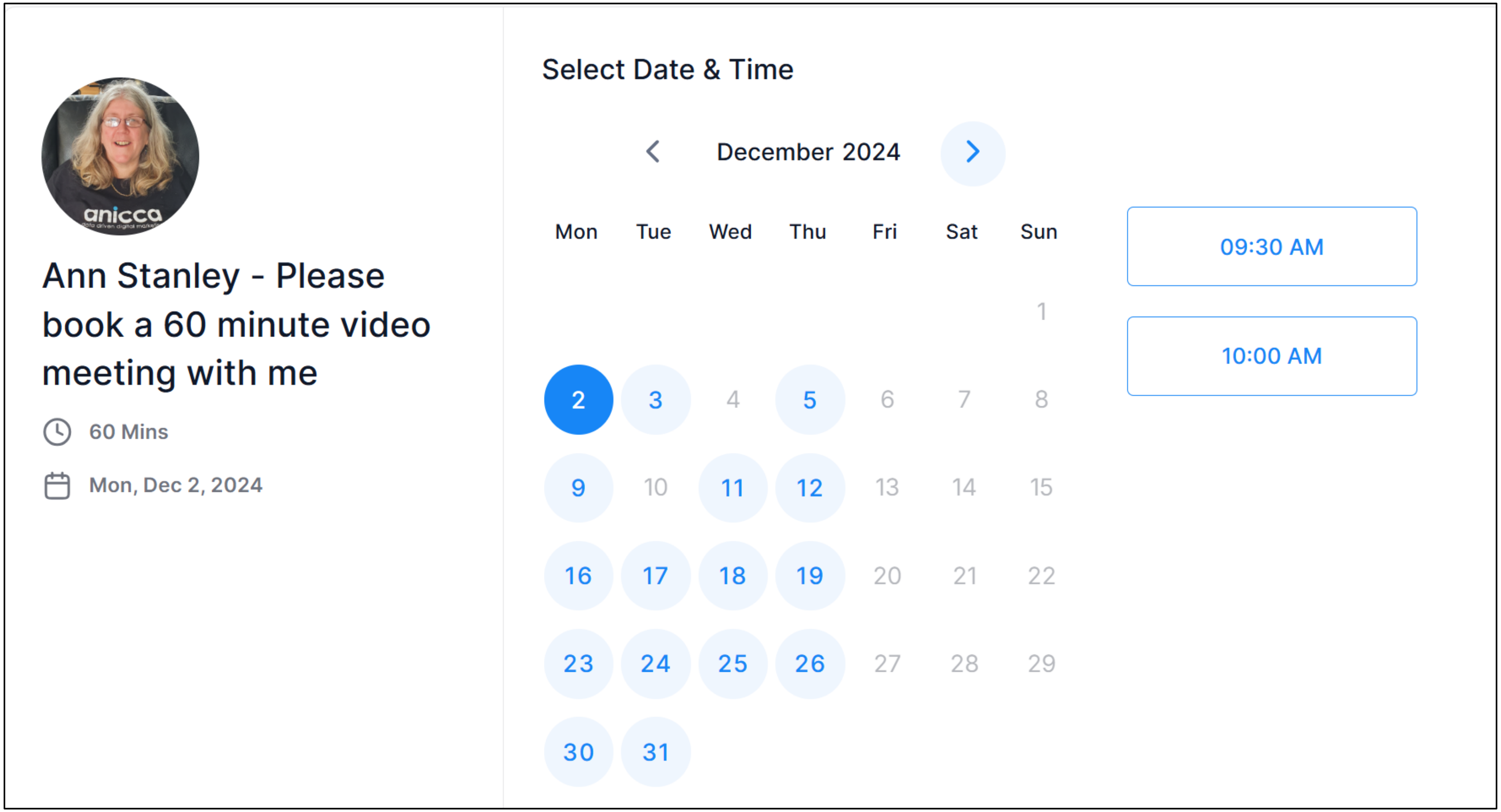
a. Configuring Calendars

- **Multiple Calendar Types:** You can create calendars for specific appointment types, such as discovery calls, consultation meetings, or internal team scheduling.
- **Custom Settings:** Each calendar can be tailored with availability settings, including buffer times between appointments to prevent overlap.
- **Sync with Google Calendar and Other Platforms:** During the demo, I showed my personal calendar synced with GHL. Appointments made through GHL automatically appear in my Gmail calendar, keeping everything in one place.

b. Client Booking Made Easy

- **Embedded Booking Links:** GHL allows you to generate booking links that can be embedded in email footers, websites, or shared via messaging platforms. For example, my email footer includes a link to book a 30-minute or 60-minute meeting with me, visible both in GHL emails and my Gmail account.
- **Dynamic Availability:** Clients only see available time slots, eliminating confusion and scheduling conflicts. For example, my next available slot appeared on Monday at 9:30 am during the demonstration, with subsequent openings displayed based on my calendar settings.

My online calendar at bit.ly/ann-stanley-60mins

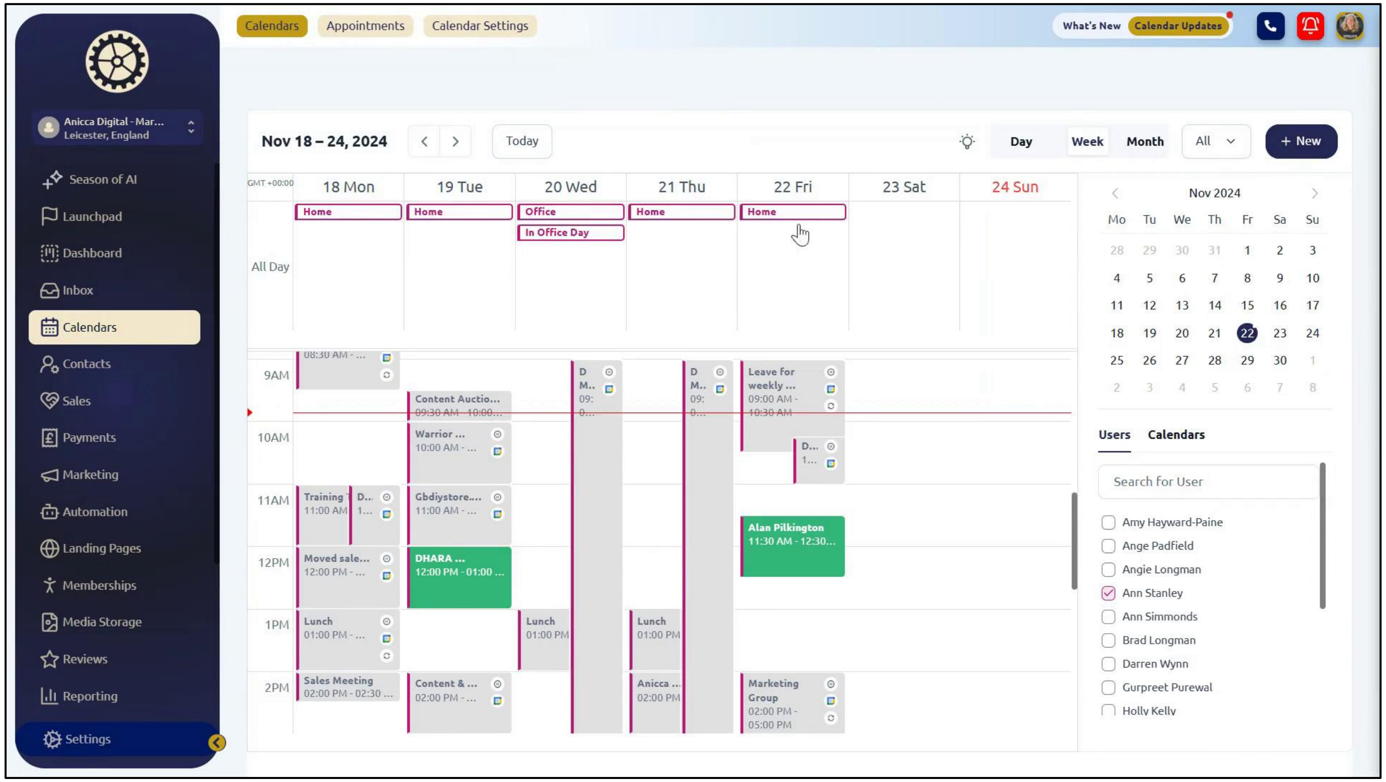


c. Team Calendars

GHL supports team-wide scheduling for collaborative appointments:

- **Group Calls:** Calendars for shared calls, such as academy screening appointments or team meetings, can include multiple participants.
- **Appointment Management:** All booked appointments are visible on the calendar and linked to the relevant contact records, streamlining follow-ups and team coordination.

My calendar in GHL – with synced appointments from my Google Calendar

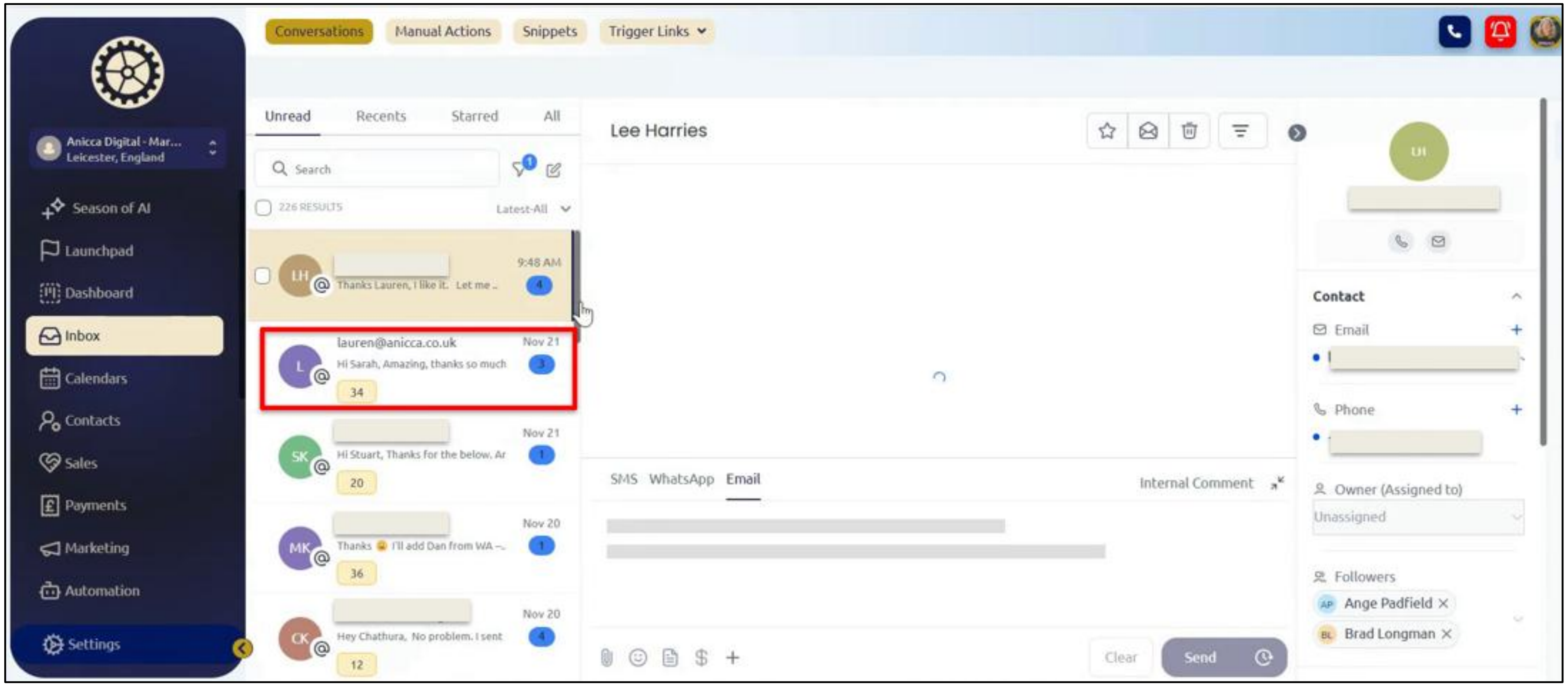


2. Inbox and Email Integration

a. Viewing Email History

- **Integrated Inbox:** For staff with synced email accounts, GHL displays a unified inbox where you can view incoming and outgoing emails. For example, I demonstrated how an email sent to Lauren by a client appeared in GHL, allowing easy tracking of correspondence. In addition. We recommend that you download the GHL App (Lead Connector), where you can view any incoming emails on your mobile device.
- **Contact-Specific Email Logs:** Each contact record includes a history of all emails sent or received, giving a complete overview of communication without leaving the platform.

Integrated Inbox within GHL



b. Sending Emails Through GHL (also refer to section 8:2)

- **Composing Emails:** You can send emails directly from GHL using pre-saved templates or snippets. During the demonstration, I used a snippet for organising discovery calls, though minor formatting adjustments were required before sending.
- **Syncing with External Accounts:** For synced accounts, emails sent through GHL also appear in your external inbox, ensuring consistency across platforms.

c. Customisation Options

- **Templates and Signatures:** Pre-configured email templates help standardise responses, and you can add personalised signatures for different team members.
- **Email Footers:** Footers can include dynamic elements like booking links, enabling recipients to schedule appointments directly from your email.

3. Practical Examples of Calendar and Email Integration

During the demonstration, I showed how these features work together in real time:

- A client booking an appointment through my email footer instantly created an entry in my GHL calendar and synced with my Gmail calendar.
- Emails sent through GHL were tracked in the contact record, alongside the appointment details.
- Group calls for the academy were scheduled and managed through team calendars, ensuring all participants had access to the same details.

4. Email newsletters

Most MAS software, including GHL, has integrated email marketing functionality within the platform. Typically, this provides similar functionality to popular packages like Mailchimp, enabling you to easily create a text or HTML template for specific campaigns. With additional features like personalisation, scheduling, integration into Workflows, and detailed reporting, GHL transforms email marketing into a powerful tool for engaging with your audience and driving measurable outcomes.

- **Email Creation**
  GHL's WYSIWYG editor allows users to drag and drop elements into their email design, ensuring a seamless creation process for both beginners and advanced marketers.

- **Targeted Email Campaigns**
  One of the standout features of GHL is the ability to create highly targeted campaigns. By leveraging Smart Lists and Tags, you can segment your audience based on behaviours, demographics, or stages in the customer journey. This ensures your emails are relevant and resonate with their recipients, leading to improved engagement and conversion rates.

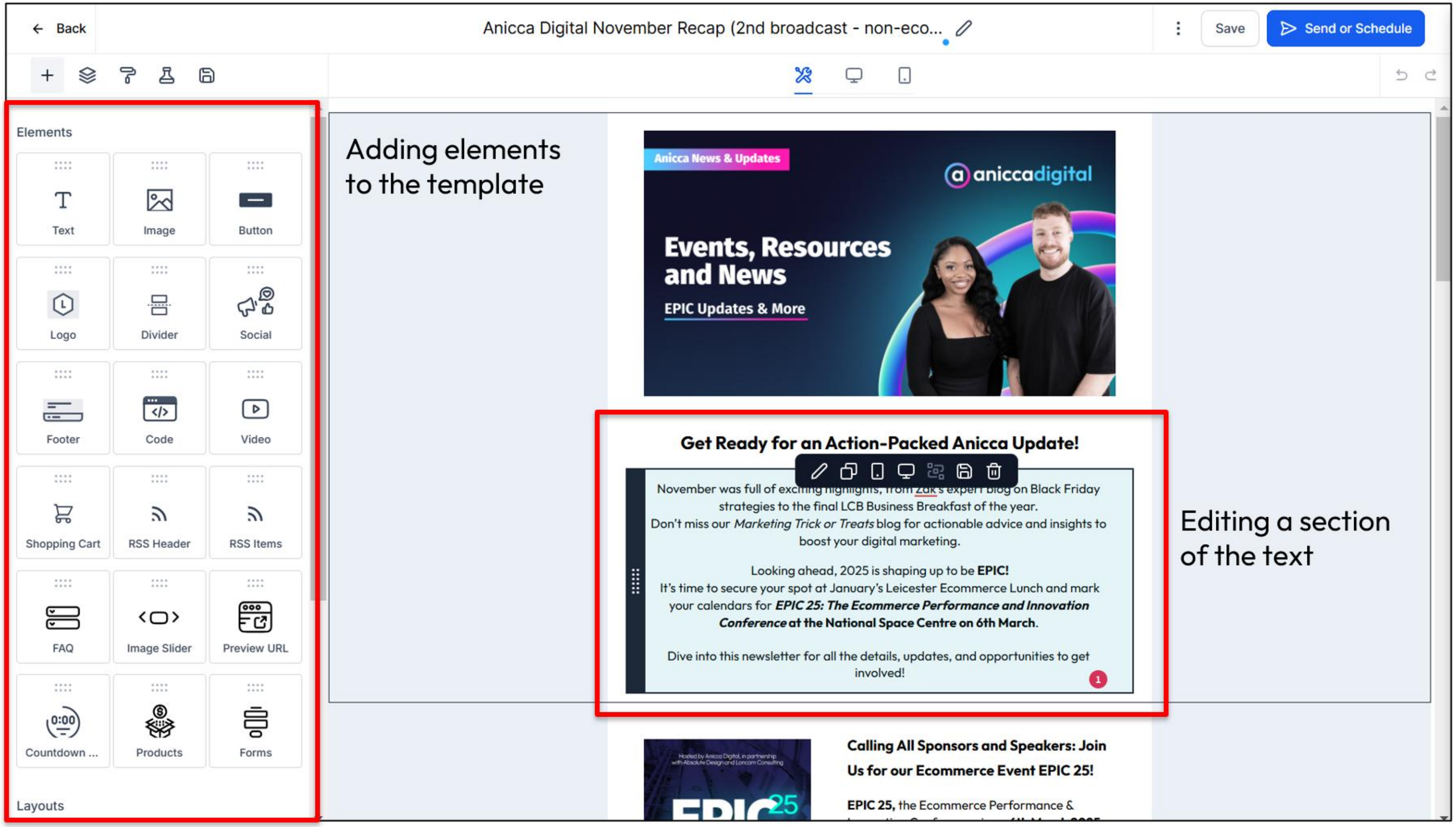
- **Scheduling and Automation**
  With GHL, scheduling email campaigns is straightforward. Emails can be sent immediately or scheduled to go out at optimal times. Additionally, GHL's automation features enable you to set up drip campaigns or follow-up sequences triggered by user actions, such as form submissions or abandoned cart events.

- **Personalisation and Dynamic Content**
  To make your campaigns more effective, GHL supports personalisation tokens and dynamic content. For instance, you can include a recipient's name, company, or even tailor content blocks based on their previous interactions. This level of personalisation fosters stronger connections and drives better results.

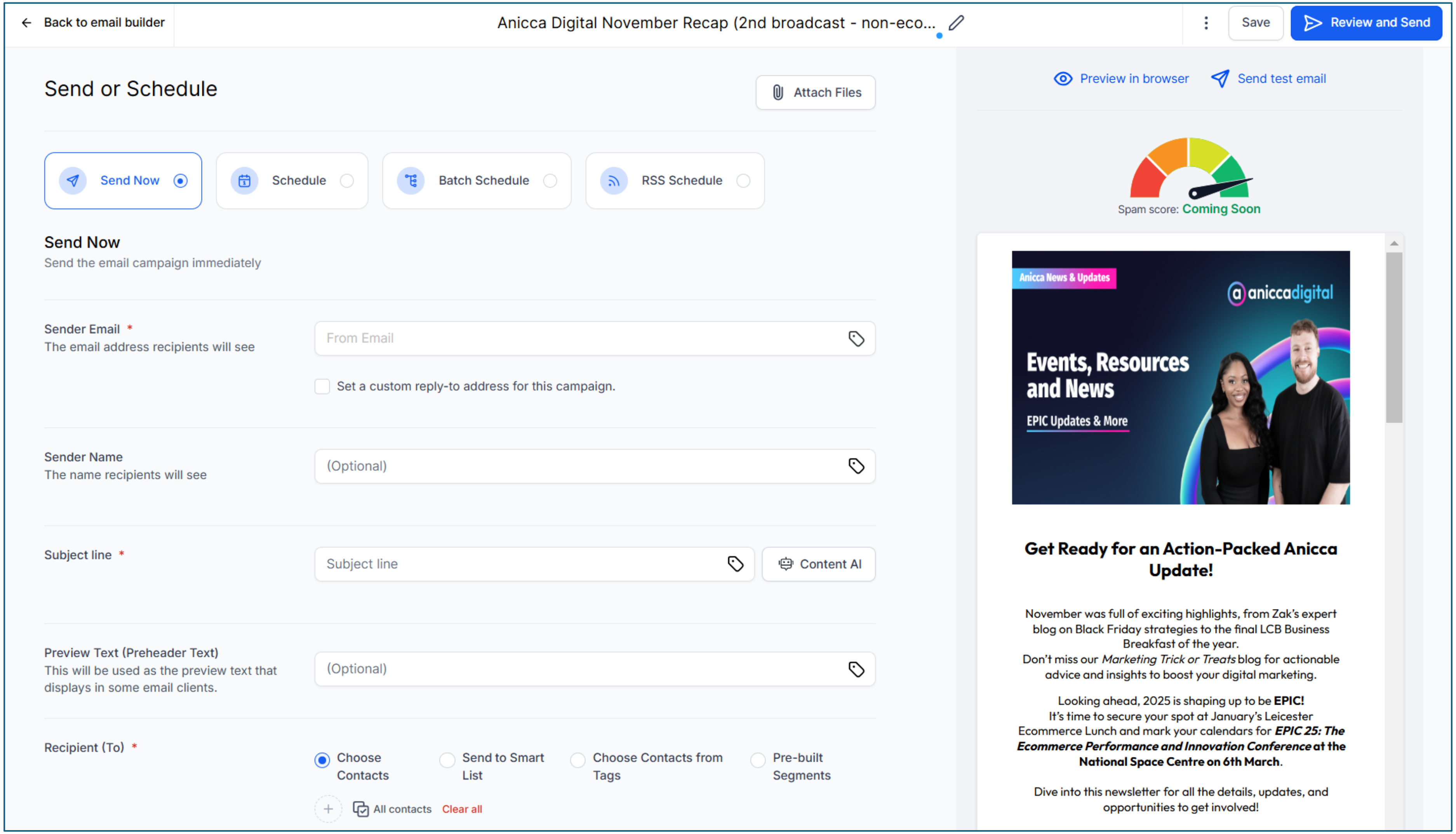
- **Advanced Reporting and Analytics**
  Post-campaign reporting is another area where GHL excels. Detailed analytics provide insights into KPIs like open rates, click-through rates, bounce rates, and unsubscribes. Additionally, you can drill down into these metrics to identify trends or segments performing well, helping refine future strategies. You can also view or download the contacts that engaged with your email, to carry out any follow-up.

- **Practical Applications**
  - Newsletter Updates: Keep your audience informed with regular updates about your products, services, or industry news.
  - Promotional Campaigns: Drive sales by highlighting offers, discounts, or new arrivals.
  - Event Invitations: Use email to promote webinars, workshops, or in-person events, and track RSVPs seamlessly within the platform.
  - Customer Retention: Set up email sequences to nurture relationships with existing customers, encouraging repeat business.

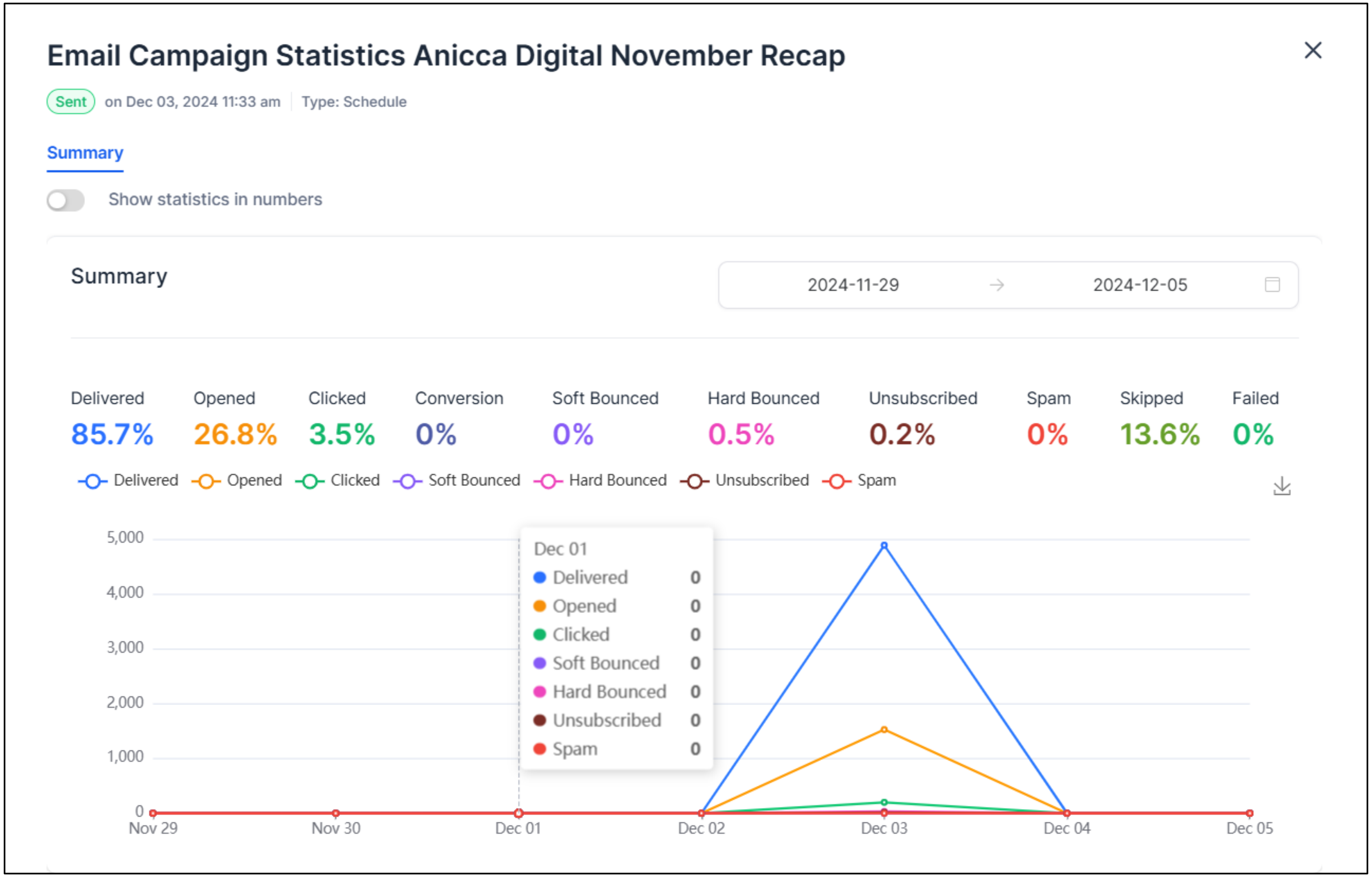
GHL Has an easy-to-use WYSIWYG editor for creating newsletters and other emails



Email settings and broadcasting the email to your target Smart List or by using Tags



Email reports



8.5 Workflows and Automation

Automation is one of the most powerful features of GHL enabling businesses to streamline repetitive tasks and improve efficiency. During the demonstration, I walked through several workflows to show how automation transforms lead management and client engagement.

1. Building Workflows in GHL

a. Example: Inquiry Form Submission Workflow
One of the workflows demonstrated was triggered by the submission of a contact form:

- **Trigger:** The workflow begins when an Inquiry Form is submitted on the website.
- **Actions:**
    1. A tag is automatically applied to the contact, such as "Inquiry Form Submitted."
    2. The system sends a personalised acknowledgment email to the contact, thanking them for their inquiry and outlining next steps.
    3. A task is created for a team member to follow up with the lead within 24 hours.
    4. If no action is taken within a specified timeframe, the workflow sends a reminder to the assigned team member.

b. Personalised Automations
Workflows can be customised to fit specific scenarios. For example:

- **Lead Nurturing:** A lead who clicks on an email link might be added to a sequence offering additional resources, helping to nurture their interest.
- **Encouraging Prospects to Complete Actions (e.g. Abandoned Cart Recovery):** While tools like Klaviyo are commonly used for Abandoned Cart Recovery in eCommerce, you can set up similar automation workflows in Go High Level (GHL). For instance, you could create a workflow to send reminders to leads who visited a pricing page but didn't convert, potentially including an incentive like a discount to encourage them to take action.

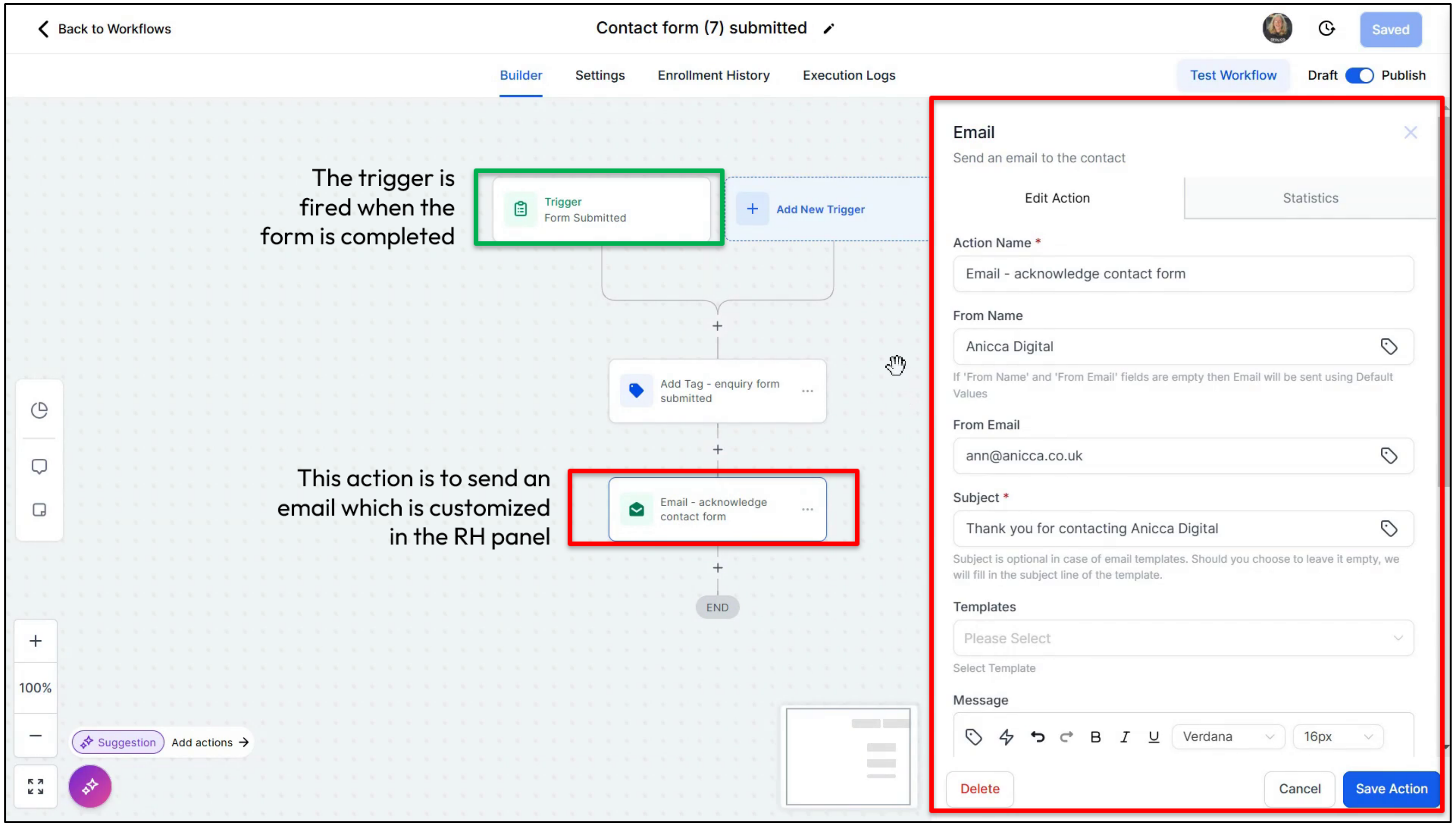
2. Real-Time Demonstration of Automation

To show automation in action, I had Jess complete a form submission during the demonstration:

- The workflow triggered instantly, tagging Jess as an "Inquiry Form Submitted."
- Her contact record updated with the form details, including the message she entered.
- An acknowledgment email was sent to her automatically, confirming receipt of the inquiry.

This live example highlighted how GHL reduces the manual effort needed to manage leads, ensuring timely and consistent follow-up.

Modifying an email (Action) in a Workflow, which was triggered when a form is submitted



9. Using Go High Level for Sales

9.1 Opportunities and Sales Pipelines

Sales pipelines in GHL help track the progress of leads from initial inquiry to conversion.

a. Custom Pipelines

- **Define Stages:** Pipelines can include stages like “New Inquiry,” “Qualified Lead,” and “Proposal Sent.”
- **Customisation:** Tailor pipeline stages to match your sales process, ensuring it aligns with your team’s workflow.
- **Dynamic Tracking:** Leads move through the pipeline dynamically, offering clear visibility into progress.

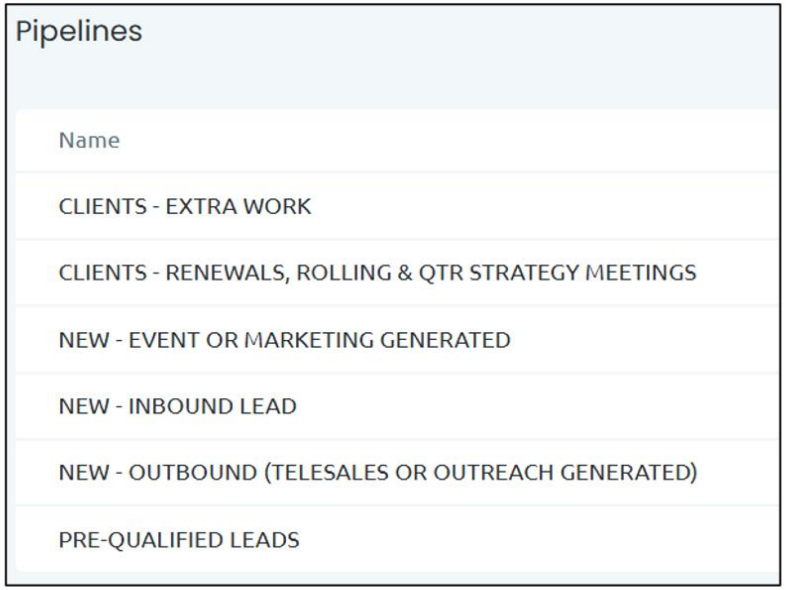
b. Custom fields in opportunities

- You can also create new Custom Fields, which are added to each Opportunity. We have added a range of additional dates and special fields where we can upload documents like the pitch deck, or order confirmation.

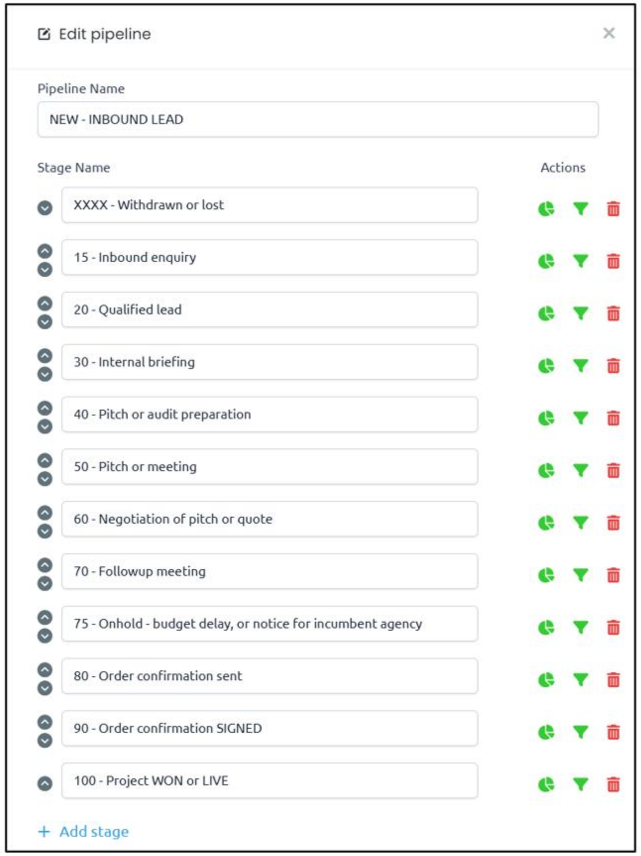
c. Pipeline Metrics
GHL provides key metrics to help your team stay focused:

- The number of active opportunities.
- The total pipeline value.
- Conversion rates between pipeline stages.

Pipelines (types of projects)

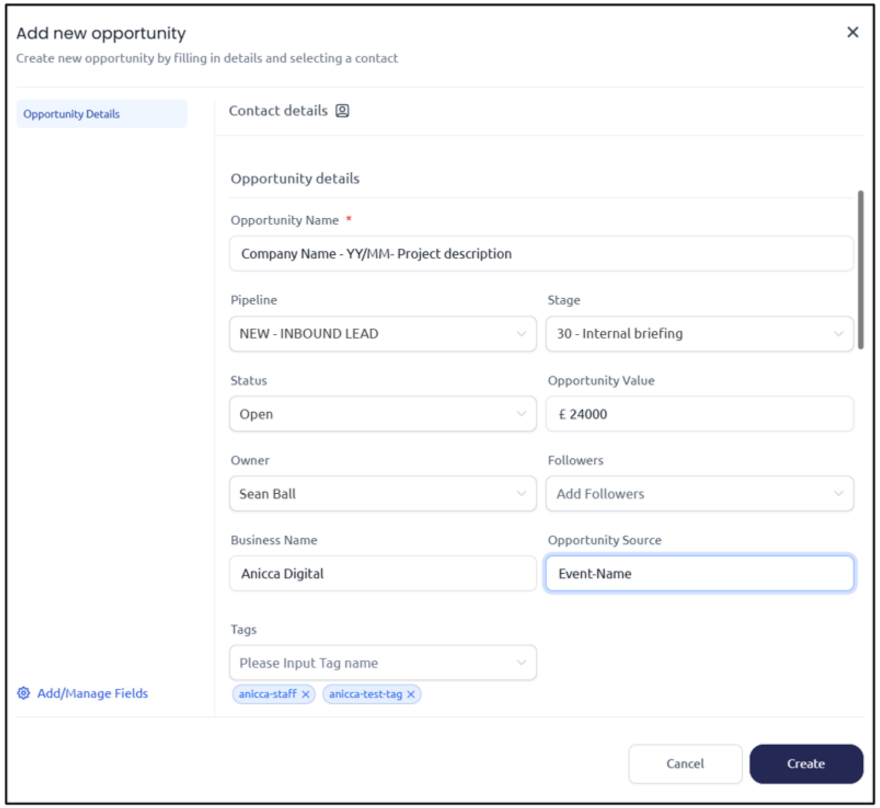


Pipelines Stages

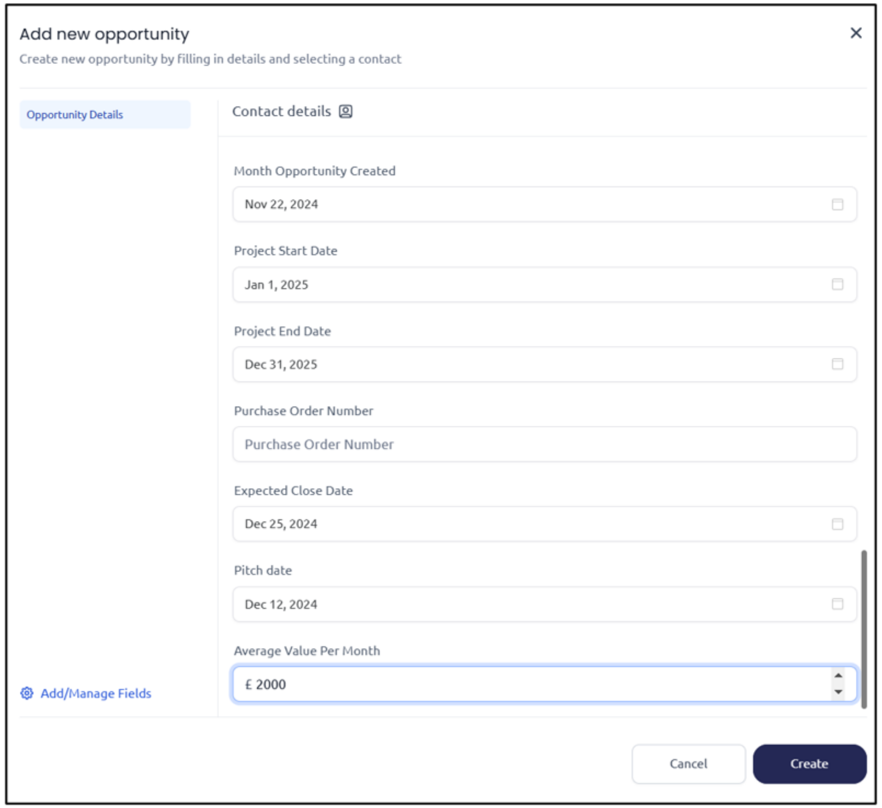


Creating or editing an opportunity

Add new opportunity



Custom fields with extra information



9.2 Dashboards and Reporting

Dashboards and reports in GHL offer insights to refine your sales and marketing strategies.

a. Sales Dashboard
The opportunities dashboard offers a clear overview of pipeline performance, including:

- The value of opportunities won, lost, and currently open.
- Conversion rates at each stage of the pipeline.

b. Comprehensive Reporting
Reports can be customised to track specific data points, such as:

- **Email Campaign Metrics:** Open rates, click-through rates, and bounce rates.
- **Lead Sources:** Performance of different lead sources and their contribution to conversions.

c. Practical Example: Tracking Wins and Losses
During the demonstration, I reviewed recent opportunities using the dashboard, highlighting:

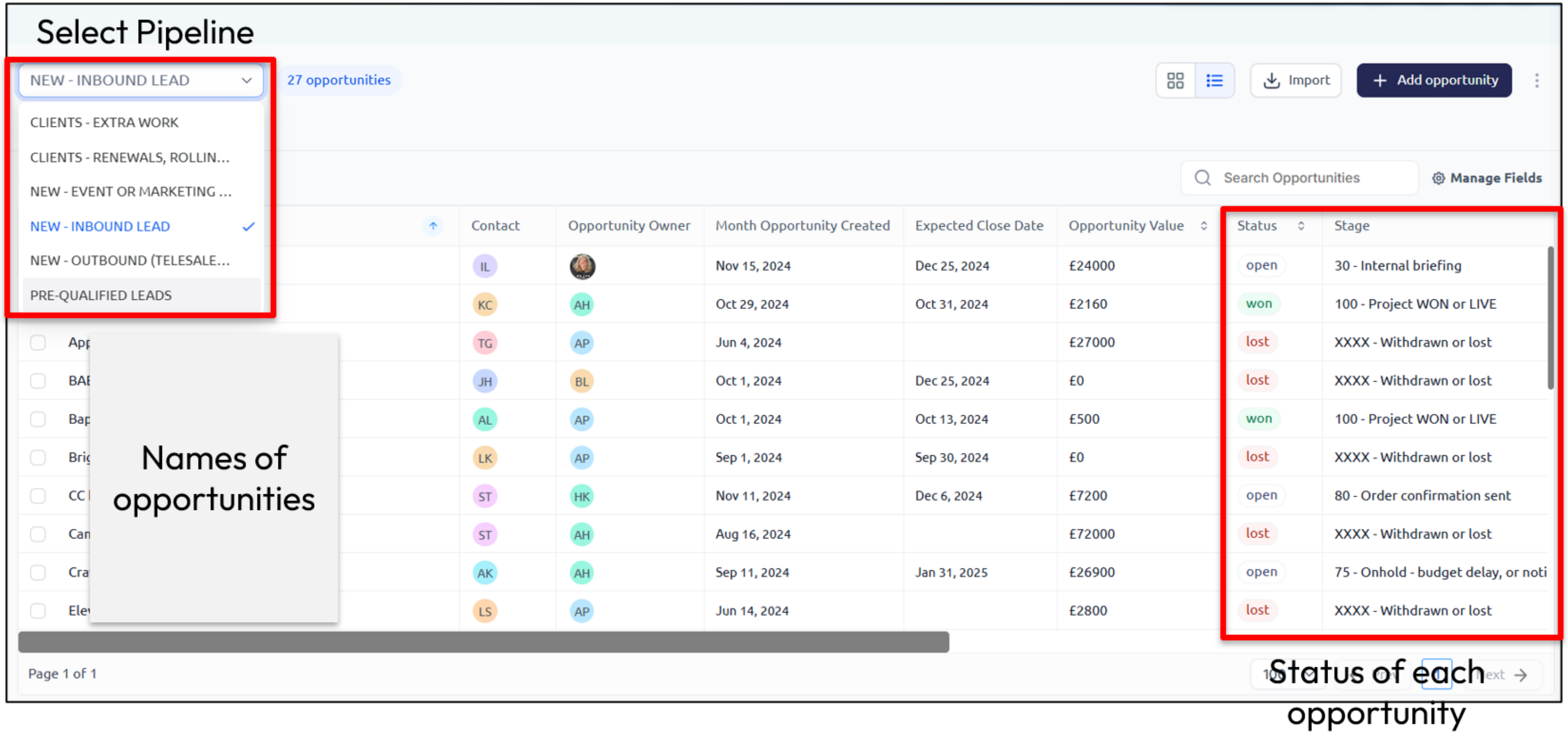
- Total value of opportunities won.
- Reasons for lost opportunities, helping to identify areas for improvement.

d. Practical Applications for Dashboards

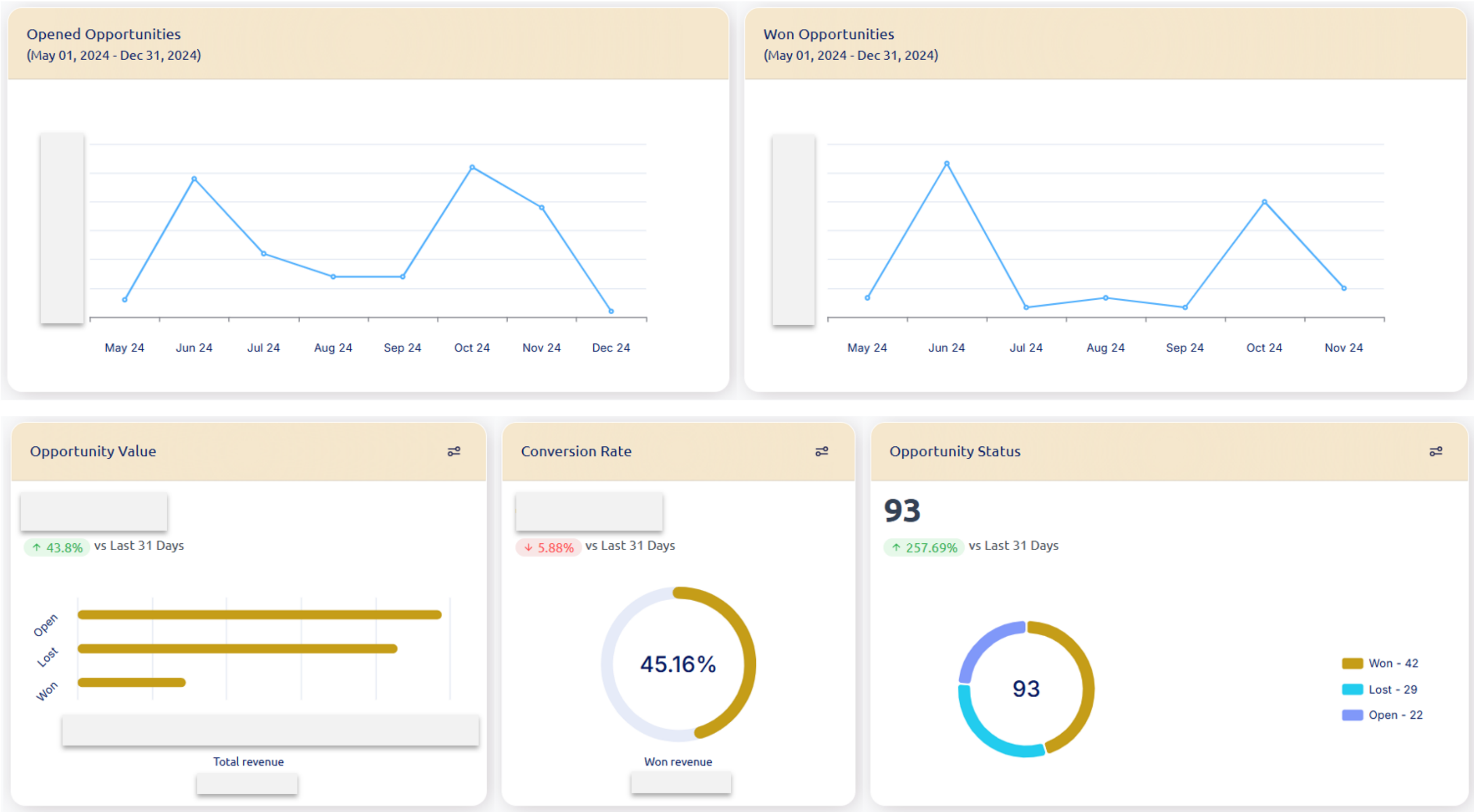
Using GHL's dashboards and reports, businesses can make informed, data-driven decisions. For example:

- Low conversion rates in abandoned cart workflows might signal a need for better incentives or messaging.
- Pipeline insights can reveal bottlenecks, such as delays in progressing leads from "Qualified" to "Proposal Sent."

Reviewing Opportunities in the Sales Menu



Examples of custom reports created in the Dashboard menu



10. Why Choose Go High Level for Your Business?

Go High Level offers a unique value proposition by integrating marketing automation and CRM into a single platform.

1. Key Benefits

- **Marketing and Sales Alignment:** A shared view of the customer journey ensures seamless collaboration.
- **Automation:** Repetitive tasks are automated, saving time and improving consistency.
- **Unified Reporting:** Insights across campaigns, workflows, and sales pipelines drive smarter decisions.

2. Simplified Operations

GHL reduces the complexity of using multiple tools by consolidating them into one platform. This unified approach improves efficiency, accuracy, and business outcomes.

11. Next Steps: Getting Started with Go High Level

If you're ready to transform your marketing and sales processes, here's how to get started:

1. Set Up Your Account

Anicca Digital offers GHL accounts with hands-on workshops to help you implement the platform effectively. You can apply here.

2. Leverage Our Expertise

We provide tailored training and ongoing support to ensure your team gets the most out of GHL.

3. Contact Us Today

Schedule a demo or reach out for more information. Visit Anicca Digital for additional resources, training sessions, and support.