

Turning coaching applications into a tracked, self nudging pipeline

A client pipeline, a Discovery Call calendar, and two workflows built end to end in GoHighLevel for a coaching practice: application intake and qualification, then call confirmation and automated reminders, from first submission through to a kept appointment.

PLATFORM GoHighLevel	BUILD Pipeline, calendar, 2 workflows
CLIENT Meridian Coaching	OFFER Free Discovery Call

An application with nowhere to go

Meridian Coaching needed its application form to do more than sit in an inbox. Every submission had to become a tracked opportunity, receive an immediate acknowledgement, and get nudged toward booking a Discovery Call if the prospect stalled — and once a call was booked, the applicant needed a real confirmation and reminder sequence, not silence until the call itself.

No pipeline visibility

Applications arrived with no way to see who had applied, who had booked a call, and who had already gone quiet.

No acknowledgement

Applicants heard nothing after submitting, left to wonder whether the form had gone through at all.

No follow up on stalled applicants

Anyone who applied but never booked a call was simply lost, with nothing prompting them back to the calendar.

No booking confirmation or reminder

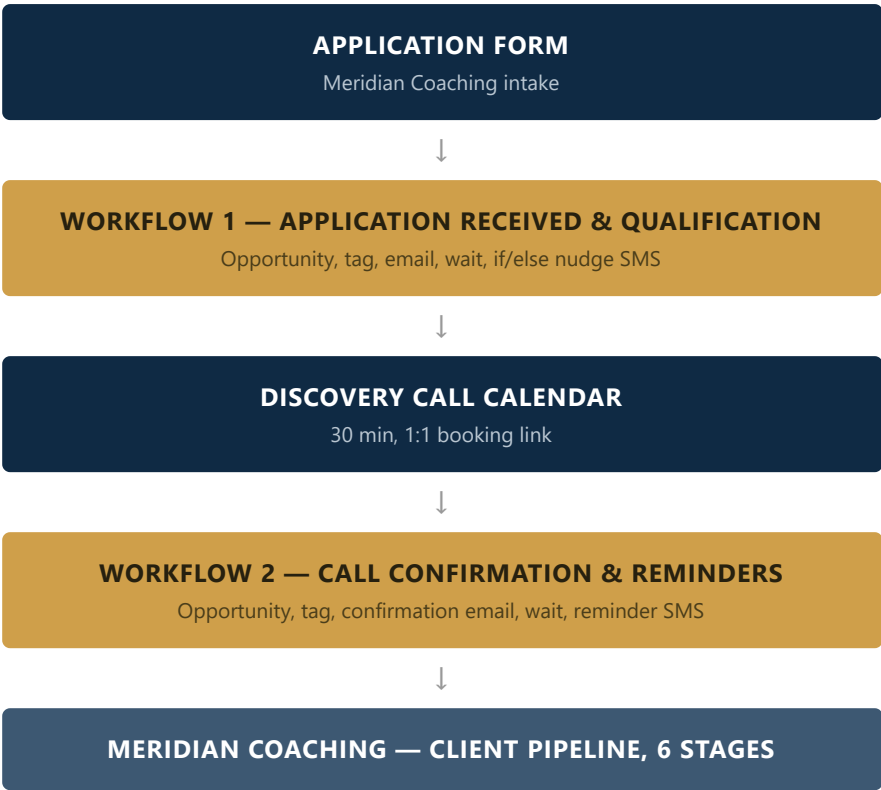
Once a call was booked there was still no confirmation and no reminder before it — the single biggest driver of no shows.

What I built

A six stage client pipeline tracking every applicant from first submission through to Client Won or Not a Fit, a dedicated 30 minute Discovery Call calendar, and two workflows: **Application Received & Qualification** (intake, tagging, confirmation email, and a nudge SMS for anyone who stalls) and **Call Confirmation & Reminders** (moves the opportunity forward the moment a call is booked, sends a confirmation email, then a timed reminder SMS ahead of the appointment).

Two workflows, one pipeline, one calendar

Every application enters through the same intake form. One workflow qualifies the lead and nudges anyone who stalls; a second workflow picks up the moment a call is actually booked and carries the applicant through to a confirmed, reminded appointment.



System architecture: one intake form, two workflows carrying the applicant from submission to a confirmed, reminded call, both feeding the same pipeline.

Every applicant tracked from submission to outcome

A six stage pipeline gives Meridian a live view of exactly where each applicant sits, from the moment they apply to the moment they become a client or are marked not a fit.

Pipelines			
1	Marketing Pipeline		9 stages · Dec 11, 2025
2	Marketing Pipeline		6 stages · Dec 11, 2025
3	Meridian Coaching Client Pipeline		6 stages · Aug 26, 2026

Pipelines list, account settings — Meridian Coaching Client Pipeline, 6 stages, most recently updated

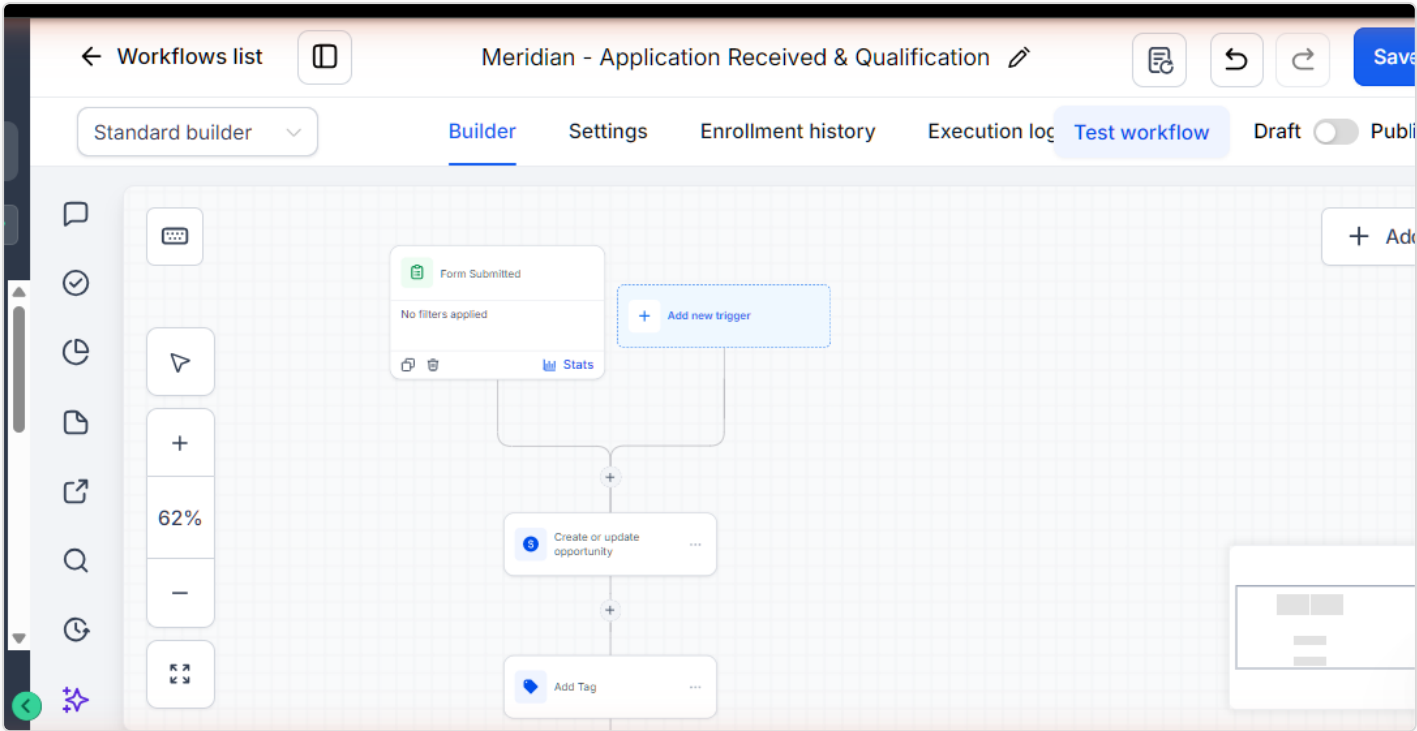
Stage	Entered when
Application Received	Form submitted; opportunity created and tagged "applied"
Call Booked	Applicant has booked their Discovery Call; opportunity moved and tagged "call booked"
Call Completed	Discovery Call has taken place
Proposal Sent	Coaching proposal sent following the call
Client Won	Applicant has signed on as a client
Not a Fit	Applicant disqualified, or determined not a good fit

Why the pipeline stays honest

Both workflows move the opportunity themselves — Workflow 1 into Application Received on submission, Workflow 2 into Call Booked the moment a Discovery Call is scheduled — so the board reflects real activity instead of a stage someone forgot to drag by hand.

Application Received & Qualification

Trigger: Form Submitted. Fires the instant an application lands, with a wait and if/else branch that checks whether a Discovery Call has already been booked before sending a nudge.

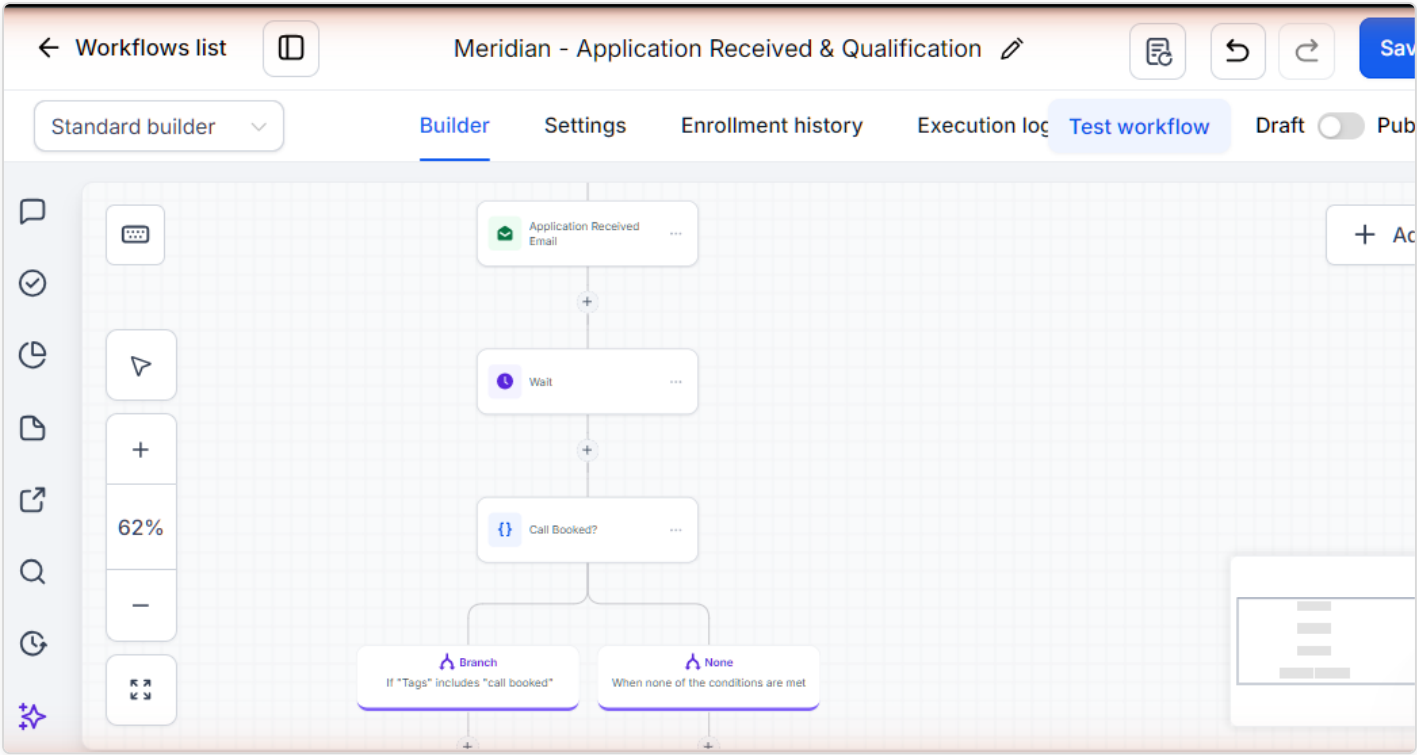


Live workflow canvas — Form Submitted trigger, Create or update opportunity, Add Tag

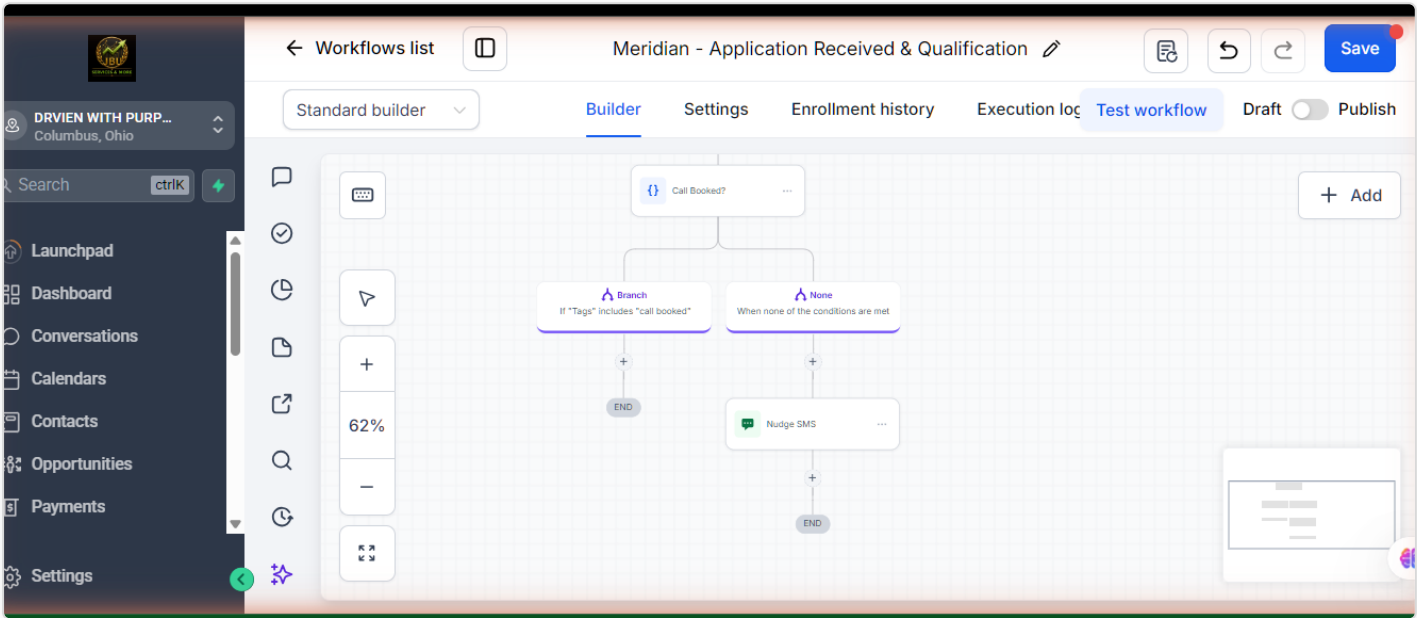
Step	Configuration
Create/update opportunity	Moves the applicant into the pipeline at the Application Received stage
Add contact tag	applied — building a permanent, filterable segment of everyone who has applied
Application Received email	Confirms receipt and sets expectations, sent immediately on submission
Wait → Call Booked? → Nudge SMS	Holds, checks the "call booked" tag, and only messages applicants who haven't booked yet

The wait, the branch, and the nudge

After the confirmation email, the workflow holds, then checks the contact's tags. Applicants who have already booked exit cleanly; everyone else receives a nudge SMS prompting them back to the calendar.



Live workflow canvas — Application Received Email, Wait, Call Booked? if/else branch



Live workflow canvas — Branch exits cleanly if booked; None branch sends the Nudge SMS before ending

Why the branch matters

An applicant who submits and never books is easy to lose track of manually. The if/else check means only the people who actually need a nudge receive one, and everyone who already booked is left alone.

Call Confirmation & Reminders

Trigger: Customer Booked Appointment (Discovery Call). The moment a call is booked, the applicant is moved forward in the pipeline, tagged, confirmed by email, and reminded by SMS ahead of the appointment.

Meridian Call Confirmation & Reminders

● Trigger — Customer Booked Appointment Contact Mode is any of "contact"

● Create or update opportunity Meridian Coaching Client Pipeline · Call Booked

● Add Tag call booked

● Call Confirmation Email Subject: Your Discovery Call is confirmed

● Wait Until 24 hours before the scheduled appointment

● Reminder SMS "Just a reminder your Discovery Call is coming up..."

Workflow 2 build — published live in the account (Draft/Publish toggle set to Publish)

Step	Configuration
Create/update opportunity	Moves the opportunity to the Call Booked stage the instant a Discovery Call is scheduled
Add contact tag	call booked — the exact tag Workflow 1 checks before deciding whether to send its nudge
Call Confirmation email	Confirms the appointment immediately after booking
Wait	Holds until 24 hours before the scheduled appointment time
Reminder SMS	Final nudge ahead of the call, reducing no shows

A dedicated calendar tied to both workflows

A 30 minute Discovery Call calendar is the hinge between the two workflows: booking it is what moves an applicant out of the nudge sequence and into the confirmation and reminder sequence.

Calendars		
Discovery Call	30 min	Active

Calendars list, account settings — Discovery Call, 30 minute slots, active and bookable

Booking is the signal

Because "call booked" is the exact tag Workflow 2 applies and Workflow 1 checks, the calendar isn't just a scheduling tool — it's the handoff point between qualification and confirmation, so nobody who has already booked gets a redundant nudge.

What this build demonstrates

Automation and CRM

Workflow builder

Trigger and action design

Contact tagging

If/else branching

Wait steps (time and appointment based)

Email + SMS actions

Multi workflow handoff

Pipeline strategy

Pipeline architecture

Stage design

Opportunity automation

Segmentation

Platform and delivery

Calendar configuration

Client scoping

Draft to publish workflow

Account documentation

Approach

- **Led with the commercial problem.** Applications were landing with no tracking, no follow up, and no reminders — that gap is what the two workflow build addressed.
- **Split the automation at the natural handoff.** Qualification and nudging live in one workflow; confirmation and reminders live in another, joined by the "call booked" tag — each stays simple to read and adjust.
- **Automated stage movement.** Both workflows update the pipeline stage as one of their own actions, so the board always reflects real activity.
- **Built the safety net selectively.** The nudge only fires on the "no" branch, so applicants who already booked are never sent a redundant reminder.

In one line

Built a coaching practice's GoHighLevel presence from a static intake form into a tracked, six stage client pipeline fed by two workflows — one that qualifies and nudges every applicant, and one that confirms and reminds every booked call.