The Done-For-You Agency Pipeline Template

5 Stages. 7 Automated Emails. Zero Guesswork.

Import this into GoHighLevel in 60 seconds. Customize with your branding. Go live. Your entire sales process — automated.

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How This Pipeline Works

Every lead that enters your business goes through **5 stages**. At each stage, the right follow-up fires automatically. You just watch the deals move and show up for the calls.

This is the exact pipeline structure I use. It took months to refine. You get it in one import.

The 5 Stages at a Glance

#	Stage	What It Means	Goal
1	**New Lead**	Just opted in or expressed interest	Deliver value within 24 hours
2	**Contacted**	First outreach sent (email/SMS)	Get a reply or book a call
3	**Booked Call**	Appointment on the calendar	Show up prepared and close
4	**Proposal Sent**	Offer is on the table	Follow up until decision
5	**Closed Won**	Deal is done	Onboard + ask for referral

Stage 1: New Lead

New Lead

Trigger: Someone opts in, downloads a lead magnet, or fills out a contact form.

What happens automatically:

- Welcome email fires immediately (Day 0 autoresponder)
- CRM creates contact record with source tracking
- If lead came from paid ad, cost data is pulled from ad platform

Your job: Nothing. Let the automation run. The lead enters your nurture sequence and warms up over the coming days.

Stage 2: Contacted

Contacted

Trigger: Lead has received at least 3 emails AND opened at least one.

What happens automatically:

- SMS follow-up: "Hey [name] — saw you've been checking out the resources. Got a quick idea for your [goal]. Worth a quick chat?"
- Personalized email with case study relevant to their industry
- Calendar link included in all messages

Your job: Nothing. The system is warming them up. You'll know when they book a call because they move to Stage 3 automatically.

Stage 3: Booked Call

Booked Call

Trigger: Lead clicks calendar link and books an appointment.

What happens automatically:

- Confirmation email fires immediately
- 24-hour reminder email
- SMS reminder 30 minutes before call
- Pre-call prep checklist sent to lead ("What to bring to our call")

Your job: Show up for the call. Review the lead's engagement history in the CRM (what they clicked, what they downloaded). Come prepared with specific recommendations.

Stage 4: Proposal Sent

📄 Proposal Sent

Trigger: After the call, you send a proposal or link to sign up.

What happens automatically:

- Post-call recap email fires 1 hour after the call
- Day 2: Case study or testimonial email
- Day 4: "Any questions?" check-in email
- Day 5: SMS follow-up if no response
- Day 7: Urgency email ("spots filling up" or "pricing changes soon")

Your job: Send the proposal. Let the follow-up sequence handle the rest. If they reply — respond. If not — the sequence keeps working.

Stage 5: Closed Won

✅ Closed Won

Trigger: Lead becomes a client or signs up via your affiliate link.

What happens automatically:

- Onboarding welcome sequence fires (5 emails over 2 weeks)
- Tag added: "Active Client" or "Trial Started"
- Post-trial or post-purchase sequence begins
- Referral request scheduled for Day 30
- Monthly check-in emails scheduled indefinitely

Your job: Deliver results. The system handles the admin. You focus on what actually matters.

Automation Triggers — Quick Reference

1. **Lead Opts In** → Move to "New Lead" → Fire Day 0 Welcome Email ↓
2. **Opens 3+ Emails** → Move to "Contacted" → Fire SMS + Calendar Offer ↓
3. **Books Appointment** → Move to "Booked Call" → Fire Confirmation Sequence ↓
4. **Call Completed** → **You Send Proposal** → Move to "Proposal Sent" → Fire Follow-Up Sequence ↓
5. **Client Signs Up** → Move to "Closed Won" → Fire Onboarding Sequence

⚡ **Power tip:** This pipeline works best inside GoHighLevel because each stage change automatically triggers the next set of actions. In other tools, you'd need to manually move leads and set up separate automations for each transition. In GoHighLevel, it's one pipeline — one import — done.

How to Import Into GoHighLevel

Step by Step

1. **Log into GoHighLevel** → Go to *Sub-Account* → *Settings* → *Import* (or *Pipelines* → *Import Pipeline*)
2. **Upload the template file** — GoHighLevel accepts JSON pipeline exports
3. **Customize stage names** if needed for your industry (e.g., "New Lead" → "New Inquiry")
4. **Connect your automations:**
   - Link the "Day 0 Welcome Email" to your email template
   - Link SMS templates to the "Contacted" stage
   - Link calendar to "Booked Call" stage
   - Link onboarding sequence to "Closed Won" stage
5. **Connect lead sources** — landing pages, forms, Facebook Lead Ads, etc.
6. **Test it:** Submit a test opt-in → watch it flow through the stages → confirm automations fire
7. **Go live.**

> **Don't have GoHighLevel yet?** Start your 14-day free trial — no credit card needed. Import this template, customize it, and test it. If it's not for you, walk away. Nothing lost. → **[LINK]**

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