OPERATIONAL FLOW DIAGRAM

Lead Capture to Booking System

From Lead Submission to Confirmed Consultation

PROJECT TYPE	PRIMARY PLATFORM	SUPPORTING SERVICES
Real Company Implementation	**GoHighLevel**	**Gmail · Google Calendar**

BUSINESS OBJECTIVE: Standardize lead capture, appointment scheduling, and customer communication while reducing manual coordination.

Lead Enters System 01

PURPOSE: Capture an incoming business inquiry through the consultation landing page.

OUTCOME: Visitor decides to submit an inquiry.

Lead Capture Form 02

PURPOSE: Collect structured lead information.

FIELDS COLLECTED:

- Name
- Work Email
- Phone Number
- Preferred Contact Method

OUTCOME: Lead information submitted successfully.

Input Validation 03

PURPOSE: Ensure submitted information is complete before processing.

VALIDATION:

- Required fields
- Email format verification

OUTCOME: Validated submission accepted.

Automation Trigger

04

PURPOSE: A successful form submission automatically initiates the operational workflow and all downstream business actions.

This is the central execution point of the system.

CUSTOMER COMMUNICATION

Confirmation Email

OBJECTIVES:

- Confirm successful inquiry
- Reassure the lead
- Set expectations for next steps

TEAM NOTIFICATION

Internal Notification

OBJECTIVES:

- Reduce manual checking
- Improve response readiness

Thank You Page

05

PURPOSE: Confirm successful submission and guide the lead toward scheduling a consultation.

Appointment Booking

06

PURPOSE: Allow the lead to select an available 30-minute consultation slot using the GoHighLevel booking calendar.

Booking Confirmation Email

07

PURPOSE: Confirm the scheduled consultation.

INCLUDES:

- Appointment details
- Reschedule option
- Cancel option

Google Calendar Synchronization 08

PURPOSE: Maintain synchronized appointment availability between GoHighLevel and Google Calendar.
OUTCOME: Consistent scheduling visibility across both platforms.

Automated Reminder Sequence 09

PURPOSE: Reduce missed consultations through scheduled reminder emails.

REMINDER SCHEDULE:

- 24 Hours Before
- 1 Hour Before
- 5 Minutes Before

DELIVERY METHOD: Email

Confirmed Scheduled Consultation

The operational workflow successfully transitions a lead from the initial inquiry to a confirmed consultation through standardized automation, structured communication, and reliable scheduling.

OPERATIONAL BENEFITS

- Reduced manual appointment coordination
- Standardized lead handling
- Consistent customer communication
- Reliable consultation scheduling

IMPLEMENTATION STACK

GoHighLevel | Gmail | Google Calendar

Designed by Nitin Mishra · linkedin.com/in/NitinMishra-me

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