

Lead Generation Setup Checklist

GHL pipeline, notifications, and source tracking — build it once, run it forever

GHL PIPELINE CONFIGURATION

Create Buyer Pipeline — 7 stages in GHL

New Lead, Attempted Contact, Connected, Consultation Booked, Active Buyer, Under Contract, Closed.

CRITICAL

Create Seller Pipeline — 7 stages in GHL

New Lead, Attempted Contact, Connected, Appointment Set, Appointment Done, Listing Active, Closed.

CRITICAL

Set up source tags for all 8 lead sources

Facebook Ad, Google Ad, Listings to Leads, Referral Exchange, Sphere, Door Knock, Cold Call, YouTube.

CRITICAL

Enable push + email + SMS notifications for new leads

Settings > Notifications. Test each channel. You must know within seconds when a lead arrives.

CRITICAL

Set up missed-call text-back automation in GHL

When a lead calls and you miss it, GHL auto-texts within 60 seconds. Prevents leads moving on.

CRITICAL

LEAD CAPTURE & ROUTING

Connect Facebook Lead Forms to GHL via integration

All Meta lead form submissions flow directly into GHL pipeline. Test with a sample submission.

CRITICAL

Connect Listings to Leads to GHL pipeline

Configure the L2L integration so property inquiries land in your buyer pipeline automatically.

HIGH

Confirm Referral Exchange leads route correctly in GHL

Know which pipeline stage Referral Exchange leads enter and verify contact info is complete.

HIGH

Set up Google Ads conversion tracking

Connect Google Ads to your GHL landing page for accurate ROI measurement per campaign.

HIGH

NURTURE SEQUENCE SETUP

**Build the hot lead sequence — 7-day initial contact cadence**

Day 0: SMS. Day 1: Call task. Day 2: Value text. Day 4: Market email. Day 7: Call task.

CRITICAL**Build the warm lead sequence — weekly emails for 90 days**

Automated weekly market update. Short, valuable, non-salesy. Soft CTA on every email.

CRITICAL**Build the long-term nurture sequence — monthly for 12 months**

One market update email per month. Set it and let GHL run it while you focus on active leads.

CRITICAL**Set behavioral re-engagement triggers in GHL**

If contact opens 3 emails or clicks any link — move to warm sequence, trigger manual call task.

HIGH**Notes**