



## Lead Capture & Follow-Up (CRM Automation Process)

**Department:** Sales / Marketing / Operations

**Applies To:** All UAC Clubs, Franchisees, and Marketing Partners (Kode0, HQ)

**Purpose:** To establish a consistent, automated, and trackable lead management process for all UAC clubs.

This ensures every lead from social media or campaigns is:

- Captured accurately,
- Stored in the CRM (Go High Level),
- Contacted promptly,
- Nurtured through automated follow-up flows,
- And converted into booked appointments or memberships.

### Scope

This SOP applies to:

- All UAC club marketing activities (Meta Ads, Google Ads, landing pages, organic leads).
- Franchise Owners, Centre Managers, and Sales Coaches responsible for local lead handling.
- Kode0 Marketing Agency & HQ overseeing automation, ad campaigns, and tracking.

### Objectives

1. Ensure no lead is lost from inquiry to contact.
2. Achieve response times of under 10 minutes per new lead.
3. Standardize automation and data capture across all clubs.
4. Support higher lead conversion rates (target 25%+) through structured follow-up.

### System Used

System / Platform	Purpose
<b>Meta Ads (Facebook/Instagram)</b>	Lead generation through campaigns
<b>Go High Level (CRM)</b>	Centralized lead management, pipeline tracking, automated SMS & email
<b>Zapier</b>	Automation bridge between Meta, Google Sheets, and CRM
<b>Google Sheets (HQ Dashboard)</b>	Lead tracking & reporting (optional backup)
<b>GymMaster</b>	Conversion data (post-join)

# CLUB OPERATIONS STANDARDS

## Process Overview

The UAC digital funnel flow:

Social Media Lead → Go High Level (CRM) → Zapier Automation → Contact → Follow-Up Sequence → Conversion → GymMaster

## Lead Capture Process

Step	Action	Responsible	System / Tool
1	Lead Generated via Meta Ad / Form Submission	Marketing (Kode0 / Franchise)	Facebook / Instagram Lead Form
2	Zapier triggers automation to send data to CRM	Automation (HQ/Kode0)	Zapier Integration
3	Go High Level CRM creates new contact & assigns to club pipeline	CRM Automation	Go High Level
4	Auto-response SMS & Email sent to lead within 2 mins	CRM	Pre-set workflow
5	Lead status set to "New Lead" in CRM dashboard	CRM	Go High Level
6	Club Manager notified via email or SMS of new lead	CRM Automation	Go High Level
7	Sales team manually calls / messages lead within 10 mins	Club Manager / Sales Coach	CRM or Phone

# CLUB OPERATIONS STANDARDS

## Follow-Up & Nurture Workflow

Automation via Go High Level + Zapier

Timeframe	Action	Automation Type
<b>Immediate (0-2 min)</b>	SMS: "Hi [Name], thanks for your interest! A UAC coach will reach out shortly to book your free session."	Auto-SMS
<b>+15 min</b>	Email: "Your Free Trial Awaits!" with booking link or contact details.	Auto-Email
<b>+4 hours</b>	Reminder SMS (if no response): "Still keen to train with us? Let's book you in."	Auto-SMS
<b>+1 day</b>	Follow-up email with UAC highlights (video, benefits).	Auto-Email
<b>+3 days</b>	Manual follow-up call required – marked in CRM task list.	Manual Task
<b>+7 days</b>	Final follow-up SMS or "Last Call" email to re-engage lead.	Auto-SMS/Email

## Lead Status Tags in CRM

### (Status & Definition)

- New Lead - Lead captured but not contacted yet.
- Contacted - Lead called or messaged by sales staff.
- Booked Appointment - Trial session or tour scheduled.
- No Response - No reply after 3 follow-up attempts.
- Converted - Joined as a paying member (move to GymMaster).
- Not Interested - Lead declined offer.

# CLUB OPERATIONS STANDARDS

## Manual Tasks (Club Level)

Task	Who	Frequency
Call all new leads within 10 minutes of receiving notification	Centre Manager / Sales	Ongoing
Update CRM status after every contact	Admin / Sales	Daily
Review pipeline dashboard	Manager	Weekly
Submit monthly lead conversion report to HQ	Franchise Owner	Monthly

## Automation Setup (Zapier)

Zapier connections (pre-built by HQ or Kode0):

1. Facebook Lead Form → Go High Level CRM
  - Trigger: New Lead Submission
  - Action: Create Contact in CRM → Assign to “UAC [Club] Pipeline”
2. CRM → Email/SMS
  - Trigger: New Contact Added
  - Action: Send Welcome SMS & Email Sequence
3. CRM → Notification
  - Trigger: Contact Added
  - Action: Notify Assigned Club Manager via SMS/Email
4. CRM → Google Sheet Backup (Optional)
  - Trigger: Contact Added
  - Action: Add to HQ Dashboard Sheet

*All Zaps must be monitored weekly for connectivity errors.*

# CLUB OPERATIONS STANDARDS

## Reporting & KPI

Metric	Target	Tracked In
Lead Response Time	< 10 minutes	CRM Timestamp
Contact Rate	90%+	CRM Dashboard
Conversion Rate	25%+	GymMaster + CRM
Follow-Up Completion	100%	Task Automation
Zapier Success Rate	98%	Zapier Logs

## Escalation

If automation fails or leads aren't syncing:

1. Check Zapier error log.
2. If unresolved within 24 hours → notify Kode0 CRM Team ([crm@kode0.com](mailto:crm@kode0.com)).
3. Escalate persistent sync issues to UAC HQ Marketing Support ([marketing@uac.com.au](mailto:marketing@uac.com.au)).

## Review & Audit

- Monthly CRM audits by HQ Marketing & FSO.
- Review pipeline stages, uncontacted leads, and automation performance.
- Quarterly report on lead source vs conversion for ad budget optimization.

# CLUB OPERATIONS STANDARDS

## Communication Templates

### A. Auto Welcome SMS

Hi [First Name]! Thanks for reaching out to Universal Athlete Centre 💪

We'd love to get you started — reply YES and our team will call to book your free trial!

### B. Manual Follow-Up Call Script

"Hi [Name], this is [Your Name] from Universal Athlete Centre.

I saw you registered for a free trial!

We've got a few times this week available — would you like to come in for a session?"

### C. Nurture Email

Subject: Your UAC Journey Starts Now

Welcome to Universal Athlete Centre! Whether your goal is performance, recovery, or training smarter, our team's here to help you every step of the way.

[Click here to book your first session → \[Booking Link\]](#)

## Compliance

- All CRM data must comply with Australian Privacy Laws (APP 2020).
- Consent must be clearly obtained via lead forms.
- Member data is confidential and must not be exported without HQ approval.

## Review Schedule

- SOP reviewed annually or after system or partner updates (e.g., new CRM, API changes).
- Managed by HQ Marketing Operations.

## Quick Reference Summary

Stage	Tool	Responsible	Automation
Lead Generated	Meta / Google Ads	Kode0 / Franchise	Zapier Trigger
Lead Captured	Go High Level	CRM	Auto Entry
Lead Contacted	Phone / SMS	Club Staff	Partial
Follow-Up	Go High Level Sequences	CRM	Automated
Conversion	GymMaster	Manager	Manual