

GHL Automation

Roadmap

Complete CRM & Lead Management Solution

ORKAY TILES



Executive Summary

This roadmap outlines the implementation of GoHighLevel (GHL) as a comprehensive CRM and automation platform for Orkay Tiles. The solution will streamline lead management, automate customer communications, and provide real-time analytics for your sales team.

50+

Team Members

14

Sales Zones

6

Core Workflows

5

Dashboards



Key Benefits

Centralized Lead Management

All leads from Meta Ads, Google Ads, WhatsApp, IndiaMART, and JustDial in one place

Automated Lead Qualification

AI-powered chatbot separates B2B leads from end users automatically

Smart Lead Routing

Automatic assignment to territory managers based on location

Follow-up Automation

Never miss a follow-up with automated sequences and reminders

Call Tracking & AI Summaries

Hindi/English call transcription with automatic summaries

Real-time Analytics

Live dashboards for performance tracking and insights



Platform Integrations

Seamlessly connect all your lead sources and communication channels:

WhatsApp Business API

Meta Ads

Google Ads

IndiaMART

JustDial

TradeIndia

Email

Website Forms



B2B Sales Pipeline

Visual pipeline to track every lead through the sales journey:

New Lead

Contacted

Requirement Understood

Catalogue Shared

Price Shared

Negotiation

Converted ✓

Lost



Automation Workflows

1. Lead Qualification Bot

- Auto-send welcome message to new leads
- Identify B2B vs End User via chatbot
- Collect business details automatically
- Archive end users, route B2B to pipeline

2. Region-Based Lead Router

- Auto-assign leads to 14 territory managers
- City/State-based routing rules
- Instant notification to assigned rep
- Auto-create follow-up tasks

3. B2B Follow-up Sequence

- Day 1: WhatsApp reminder if not contacted
- Day 3: Email with catalogue
- Day 6: Escalation to manager
- Auto-stop when lead responds

4. Pipeline Stage Automations

- Auto-tasks for each stage
- WhatsApp notifications to customers
- Manager alerts for negotiations
- Celebration alerts on conversion

5. Missed Follow-up Alert

- Daily scan for inactive leads
- Auto-create urgent tasks
- Manager notification digest

6. AI Call Transcription & Summary

- Hindi/English transcription support
- AI-generated call summaries
- Auto-extract requirements & next steps
- Lead temperature scoring



Analytics Dashboards

Real-time visibility into sales performance and team productivity:



Management Overview



Team Performance



Pipeline Analytics



Lead Source Tracking



Call Activity Monitor



Daily Reports



Territory Coverage

Organized sales coverage across all regions:

- ✓ **West Region (4 Zones)** — Mumbai, Maharashtra, Gujarat North, Gujarat South
- ✓ **North Region (3 Zones)** — Delhi NCR, Punjab/Haryana, UP/Uttarakhand
- ✓ **South Region (4 Zones)** — Karnataka, Tamil Nadu, Andhra/Telangana, Kerala
- ✓ **East & Central (3 Zones)** — West Bengal, Odisha/Jharkhand, MP/Chhattisgarh



Deliverables

- ✓ Complete GHL Setup — Sub-account with all configurations
- ✓ 50+ Team Members — User accounts with role-based access
- ✓ Custom Fields & Tags — Tailored for tiles industry
- ✓ WhatsApp Templates — Pre-approved message templates
- ✓ 6 Automation Workflows — Fully configured and tested
- ✓ 5 Analytics Dashboards — Real-time reporting
- ✓ Team Training — Video guides and documentation
- ✓ Post-Launch Support — Ongoing optimization

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GHL Automation Roadmap — Prepared for Client Presentation