

# 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

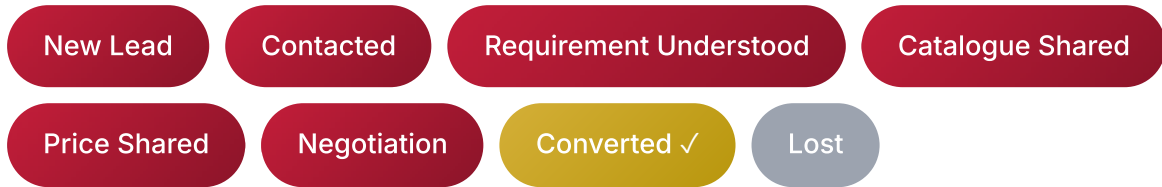


Website Forms



## B2B Sales Pipeline

Visual pipeline to track every lead through the sales journey:





# 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

## ORKAY TILES

GHL Automation Roadmap — Prepared for Client Presentation