

# CRM INTEGRATION PLAYBOOK

## AI Setup Pros — Service Delivery Guide

SERVICE 3 OF 3

AISetupPros Internal Use Only · Version 1.0

### SERVICE OVERVIEW

Connect all client tools into one unified CRM system using GoHighLevel. Two-way data sync, automatic contact enrichment, and seamless handoffs between platforms. This is the foundation that makes all other automations work.

Time to Deploy	3-7 days (varies by complexity)
Service Tier	Professional / Enterprise
Stack	GoHighLevel + n8n (for non-native integrations)
Who Installs	Builder (with GHL admin + n8n access)

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## PHASE 1 — DISCOVERY

### Step 1: List All Client Tools

Document every tool the client currently uses:

- **CRM** — What are they currently using? (HubSpot, Zoho, Salesforce, GHL, other?)

- **Email Marketing** — Mailchimp, ActiveCampaign, ConvertKit?
- **Calendar** — Calendly, Acuity, Square Appointments?
- **Forms** — Typeform, JotForm, Gravity Forms, native forms?
- **Website** — WordPress, Squarespace, Wix, custom?
- **Other Tools** — Slack, QuickBooks, Shopify, etc.

## Step 2: Map Current Workflows

1. How does a lead enter the system today?
2. What happens after a lead is captured?
3. What manual steps are they doing that should be automated?
4. What data needs to flow between tools?
5. What's the current CRM pipeline/stages?

□ **DELIVERABLE:** Create an integration map — a simple diagram showing all tools and the data that flows between them. Use Lucidchart, draw.io, or even pen and paper.

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## PHASE 2 — GHL FOUNDATION SETUP

### Step 3: Set Up GHL Sub-Account

1. Create GHL sub-account under your agency for the client
2. Set up company branding: logo, colors, business info
3. Create the pipeline with all needed stages:
  - Lead → Qualified → Consultation → Proposal → Won → Lost
4. Add custom fields for client-specific data
5. Configure tags for lead sources and statuses

### Step 4: Configure Native GHL Integrations

GHL has built-in integrations for many tools. Set up these first:

#### Native Integrations to Enable (in GHL → Settings → Integrations):

- **Google Workspace** — Email, Calendar sync
- **Outlook** — Email, Calendar sync
- **Calendly** — Appointment booking sync
- **Facebook / Instagram** — Lead capture from ads + Messenger
- **Google Ads** — Offline conversion tracking
- **Stripe / PayPal** — Payment and subscription sync

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## PHASE 3 — N8N INTEGRATION (Non-Native Tools)

### Step 5: Identify Non-Native Integrations

For tools GHL doesn't natively support, use n8n webhooks:

- Create a webhook in n8n for each integration point
- Copy the webhook URL
- Configure the external tool to send data to the webhook URL

## Step 6: Build Sync Workflows in n8n

### Example: HubSpot → GHL Sync:

1. Create n8n workflow: **Webhook → Transform Data → GHL Upsert Contact**
2. Set webhook as trigger in HubSpot (via Zapier if needed, or HubSpot workflows)
3. Map HubSpot fields to GHL fields
4. Add dedup logic: check if contact exists by email before creating
5. Set up two-way sync: also push GHL updates back to HubSpot

### Example: Form → GHL:

1. Create n8n workflow: **Webhook → Validate → GHL Create/Update Contact**
2. Connect form to n8n webhook URL
3. Map all form fields to GHL custom fields
4. Set pipeline stage and add tags automatically

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## PHASE 4 — TESTING & LAUNCH

### CRM Integration Testing Checklist

- Create test contact in source tool
- Verify contact appears in GHL within 5 minutes
- Check all fields mapped correctly (name, email, phone, custom fields)
- Test update in GHL → verify syncs back to source tool (two-way)
- Test pipeline stage change in GHL → verify automation triggers
- Verify no data loss or duplication
- Check Calendly booking → appears in GHL calendar
- Test Facebook lead → appears in GHL pipeline

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## COMMON ISSUES & FIXES

Symptom	Fix
Sync delayed (more than 5 min)	Check n8n webhook URL is correct; check n8n workflow history for errors
Duplicate contacts in GHL	Enable dedup rules in GHL Settings; add email dedup in n8n workflow
Field not mapping correctly	Check field names match exactly (case-sensitive); verify custom field IDs
n8n workflow erroring	Check node credentials; verify API keys are valid; check webhook payload format
Integration not connecting	Re-authenticate the integration in GHL; check OAuth scopes
Data missing from sync	Check which fields the source tool exposes vs. what you mapped

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## PREREQUISITES CHECKLIST

Item	Status
All client tools identified and documented	<input type="checkbox"/>
Current workflows mapped	<input type="checkbox"/>
GHL sub-account created	<input type="checkbox"/>
Pipeline stages configured	<input type="checkbox"/>
Custom fields created in GHL	<input type="checkbox"/>
Integration credentials collected (API keys, OAuth)	<input type="checkbox"/>
n8n access (for non-native integrations)	<input type="checkbox"/>

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## POST-LAUNCH CHECKLIST

Item	Status
Train client on GHL dashboard basics	<input type="checkbox"/>
Document all integration workflows (for reference)	<input type="checkbox"/>
Set up GHL monitoring alerts (if available)	<input type="checkbox"/>
Schedule 1-week follow-up to check for sync issues	<input type="checkbox"/>

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