

# EMAIL & SMS AUTOMATION PLAYBOOK

## AI Setup Pros — Service Delivery Guide

SERVICE 2 OF 3

AISetupPros Internal Use Only · Version 1.0

### SERVICE OVERVIEW

Automated email and SMS sequences triggered by client actions — welcome series, follow-up campaigns, and re-engagement flows built in n8n and connected to GoHighLevel CRM.

<b>Time to Deploy</b>	3-5 days
<b>Service Tier</b>	Starter / Professional / Enterprise
<b>Stack</b>	n8n + GoHighLevel + Gmail/SMTP
<b>Who Installs</b>	Builder (with n8n + GHL access)

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## PHASE 1 — STRATEGY & DISCOVERY

### Step 1: Map the Client Journey

Before building anything, map the customer's full journey:

1. **Identify trigger events** — What causes a contact to enter a sequence? (form fill, purchase, download, no reply)
2. **List all email stages** — Welcome → Nurture → Follow-up → Re-engagement
3. **Define delays** — Day 0 (immediate), Day 2, Day 5, Day 7, Day 14...
4. **Identify SMS touchpoints** — Appointment reminders, follow-ups, urgent only

**DELIVERABLE:** Create a simple table listing each email in the sequence:

Email #	Name	Day	Subject Line	Goal
1	Welcome	Day 0	Thanks for reaching out!	Introduce brand
2	Follow-Up	Day 3	Have questions?	Answer objections

### Step 2: Gather Content & Assets

Collect from client:

- Email copy for each sequence (or request that we write it)
- Brand voice, tone, and style guidelines
- Logo and brand assets (for HTML emails)
- Domain email address (e.g., info@clientdomain.com) — used for sending
- SMTP credentials OR Gmail OAuth for sending

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## PHASE 2 — BUILD IN N8N

### Step 3: Set Up n8n Workflow Structure

1. Log into n8n at **n8n.aisetuppros.com** (or client's n8n instance)
2. Create a new workflow for each email sequence
3. Set the workflow name: **[Client] — [Sequence Name]**

### Step 4: Build the Trigger Node

#### Option A — GHL Form Submission:

1. Add **Webhook** or **GHL Custom Webhook** node
2. Set trigger: incoming lead from GHL form
3. Map fields: name, email, phone, pipeline stage, source

#### Option B — Manual / API Trigger:

1. Add **Manual trigger** node
2. Use for testing and bulk sends

### Step 5: Build the Email Sequence

For each email in the sequence, add these nodes:

1. **Delay node** — Set days/hours between emails
2. **GHL node** — Update contact stage (moved to next pipeline stage)
3. **Email node (Gmail or SMTP)** — Compose and send email
  - Set From: client's branded email address
  - Subject line from the sequence plan
  - Use HTML template with brand styling
4. **GHL node** — Tag contact (e.g., "email-sent-welcome")

### Step 6: Add SMS (Optional)

1. In GHL, go to **SMS → Create Template**
2. Add SMS node in n8n after key email touchpoints
3. Common SMS uses: appointment reminders, "did you receive my email?"
4. Use character limit: 160 for single-SMS delivery

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## PHASE 3 — TESTING

### □ Email & SMS Automation Testing Checklist

- Submit test lead through GHL form
- Confirm Email #1 sends within 5 minutes
- Verify Email #1 appears in recipient inbox (not spam)
- Confirm delay timer works (wait for Email #2 to fire)
- Test full sequence from start to end
- Verify SMS sends correctly (if enabled)
- Check GHL contact tags and pipeline stage updates
- Test unsubscribe / opt-out link works

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## COMMON ISSUES & FIXES

Symptom	Fix
Emails going to spam	Check SPF/DKIM DNS records; warm up the sending domain; avoid spam trigger words
n8n workflow not firing	Verify webhook URL is correct; check n8n is active and workflow is turned on
SMS not sending	Confirm GHL SMS credits are loaded; verify phone number is SMS-enabled
Wrong contact information in email	Check field mapping in GHL node — verify all merge fields match
Delay timer not working	Confirm timezone settings — n8n delay is in UTC by default
HTML email formatting broken	Use a tested email template; avoid complex CSS (use inline styles only)

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## PREREQUISITES CHECKLIST

Item	Status
Client journey mapped (email sequence plan)	<input type="checkbox"/>
Email copy written for all sequences	<input type="checkbox"/>
Brand assets received (logo, colors)	<input type="checkbox"/>
Sending email address confirmed (e.g., info@client.com)	<input type="checkbox"/>
SMTP or Gmail OAuth credentials	<input type="checkbox"/>
GHL sub-account access	<input type="checkbox"/>
n8n access (URL + credentials)	<input type="checkbox"/>

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