CASE STUDY 04 · GOHIGHLEVEL AGENCY ACCOUNT · EMAIL OPT-IN · CALENDAR SYNC · A2P 10DLC

One agency account, eight energy-sector clients.

A US marketing agency serving the energy and industrial sector ran its own business and its clients' CRMs from one GoHighLevel agency account. Brought in as a white-label developer through an agency I was contracted with, I built the systems across its sub-accounts: a double opt-in newsletter, an Outlook calendar sync that turns meetings into tasks and deals, the agency's sales pipeline and compliance pages, and lead automations for a contractor client.

- 1,592 newsletter sign-ups processed
- Double opt-in with confirmation tracking
- Outlook to CRM task and deal sync
- 8 sub-accounts in one agency
- A2P 10DLC compliance pages

By. Razi ur Rehman

Agency work, through an agency.

A US marketing agency contracted me as a white-label developer. One of its clients was an agency that markets energy and industrial companies: pipe services, piling contractors, industrial suppliers, field services. I was added to that agency's GoHighLevel account to build and handle what it needed, one sub-account at a time.

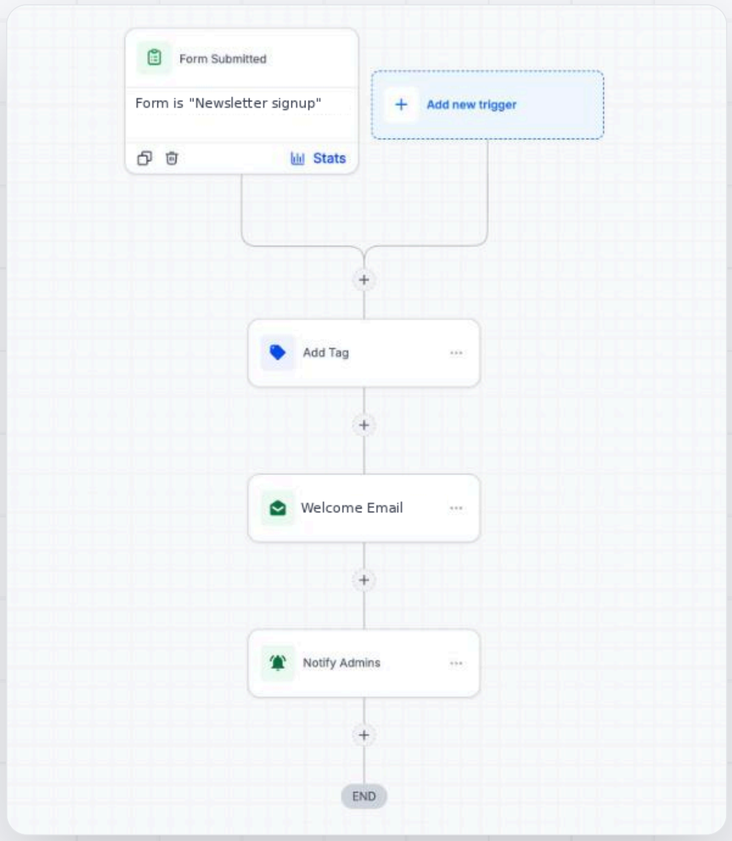
The agency's own account carried its sales pipeline and compliance pages, a second account ran its industry newsletter, and the client sub-accounts each needed their own lead and meeting automations. October 2024 to March 2025.

SUB-ACCOUNT	WHAT I BUILT
Agency main account	5-stage lead pipeline, A2P 10DLC compliance and unsubscribe pages, reviews and referrals funnels
Agency newsletter	Double opt-in newsletter: sign-up, confirmation, welcome, re-subscribe
Industrial services client	Outlook calendar to CRM sync, trip-report reminders
Piling contractor	7 lead automations: ads form, autoresponders, follow-up, reminders
4 more clients	Provisioned in the same agency account

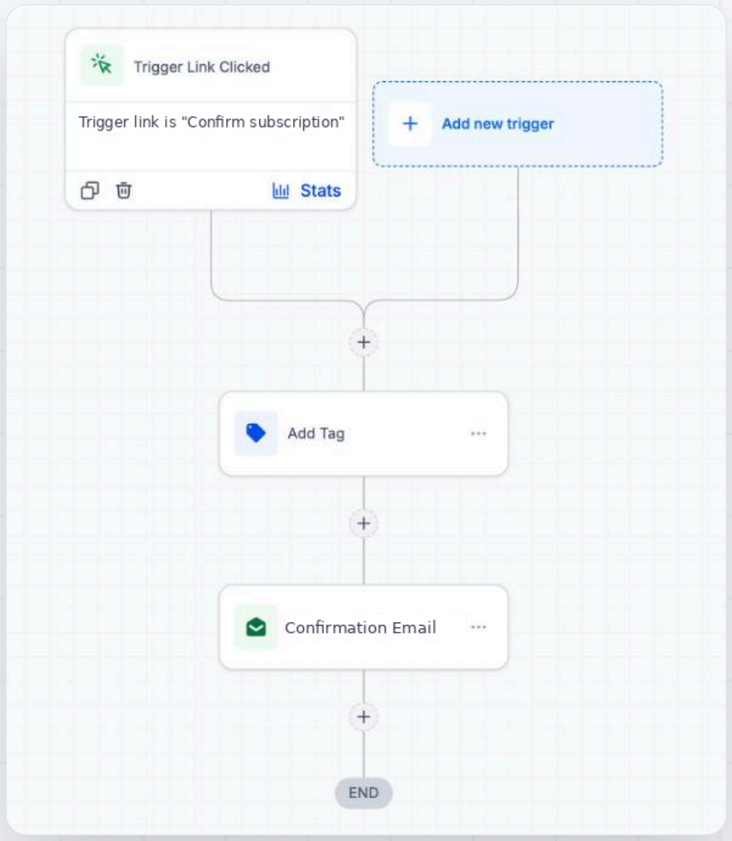
Client and company names are withheld. Screens are from the live account with names, contacts and addresses hidden.

Sign up, confirm, then send.

The agency's industry newsletter needed a list it could prove consent on. Every sign-up gets tagged, welcomed and announced to the team. Only subscribers who click the confirmation link get the confirmed tag, so the send list is the confirmed segment, not everyone who ever filled in the form.



STEP 1: FORM SUBMITTED, TAG, WELCOME EMAIL, NOTIFY THE TEAM



STEP 2: CONFIRMATION LINK CLICKED, CONFIRMED TAG, CONFIRMATION EMAIL

Consent you can show

Sign-up and confirmation are separate tags with their own dates, so the agency can prove who opted in and when.

The team sees every sign-up

An internal notification fires on each new subscriber, so nobody has to check the list.

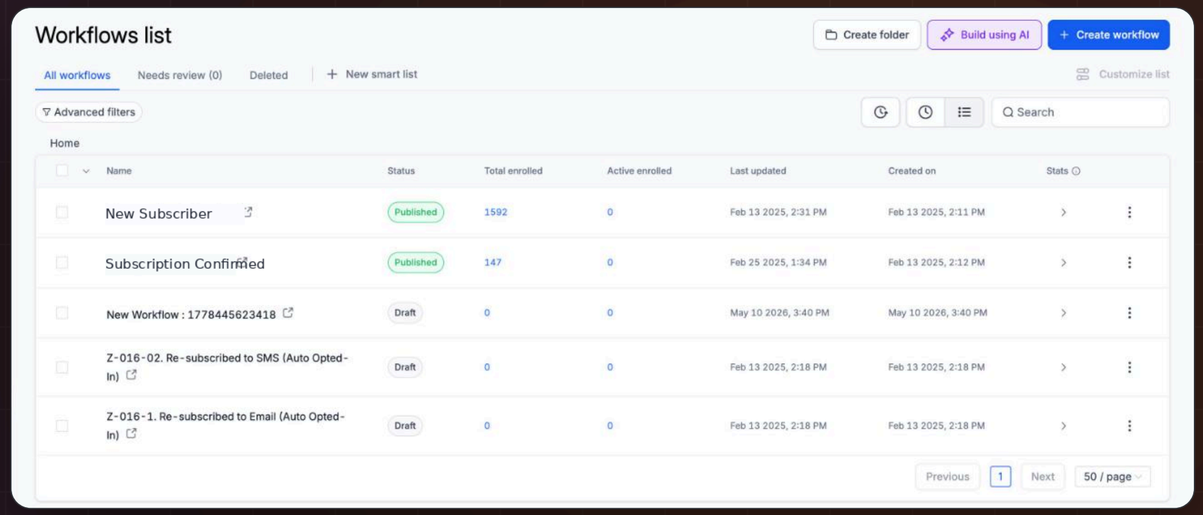
Re-subscribe paths ready

Separate flows restore email or SMS opt-in when a contact asks back in, instead of a manual tag edit.

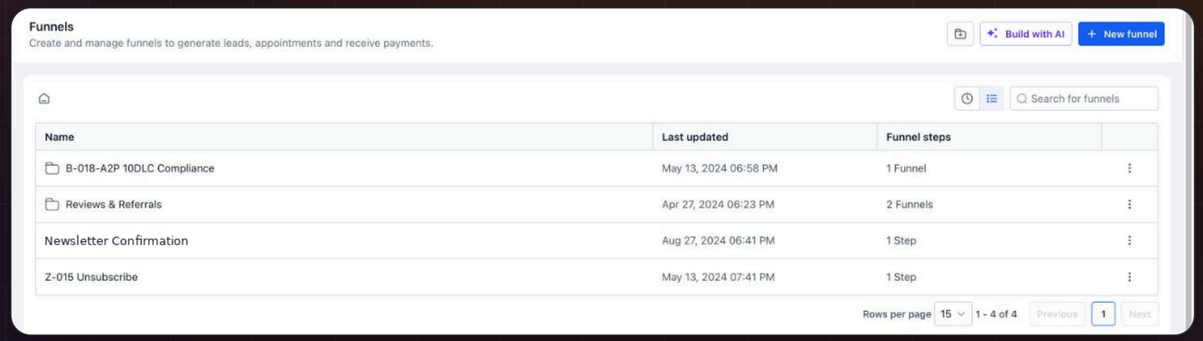
1,592 sign-ups, no manual step.

Published in February 2025. The counts are straight from the account: every sign-up went through the same path, and the confirmed segment is the list campaigns can safely go to.

- Two-step newsletter funnel: sign-up page and confirmation page
- News and events email template in the agency's branding
- Unsubscribe page and A2P 10DLC compliance pages for SMS



NEWSLETTER WORKFLOWS: 1,592 ENROLLED AT SIGN-UP, 147 CONFIRMED



AGENCY FUNNELS: COMPLIANCE, REVIEWS AND REFERRALS, CONFIRMATION, UNSUBSCRIBE

1,592
sign-ups through the opt-in flow

147
confirmed via the email link

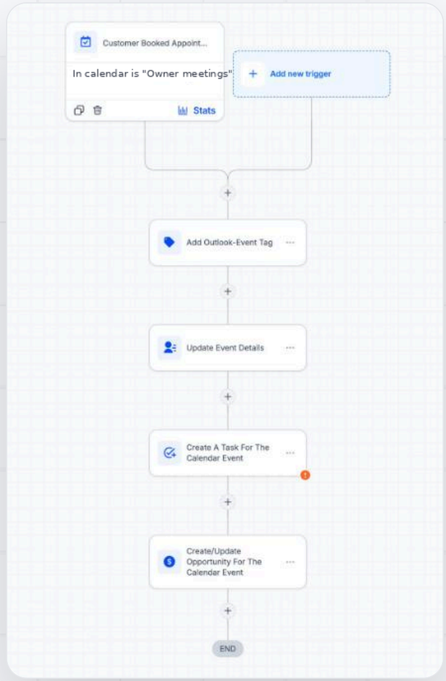
1,395
contacts on the newsletter account today

4
compliance and list pages built

Meetings become tasks and deals.

An industrial services client ran its meetings from Outlook. Their owner's meetings now land in GoHighLevel automatically: the booked event tags the contact, writes the meeting details onto the record, creates a follow-up task and creates or updates the opportunity, so the pipeline reflects real conversations without anyone re-typing them.

- Native GoHighLevel build, no third-party connector to pay for
- Trip-report reminder fires 7 days after each event
- Agency pipeline: New Lead, Booked, Cancelled, No-Show, Showed

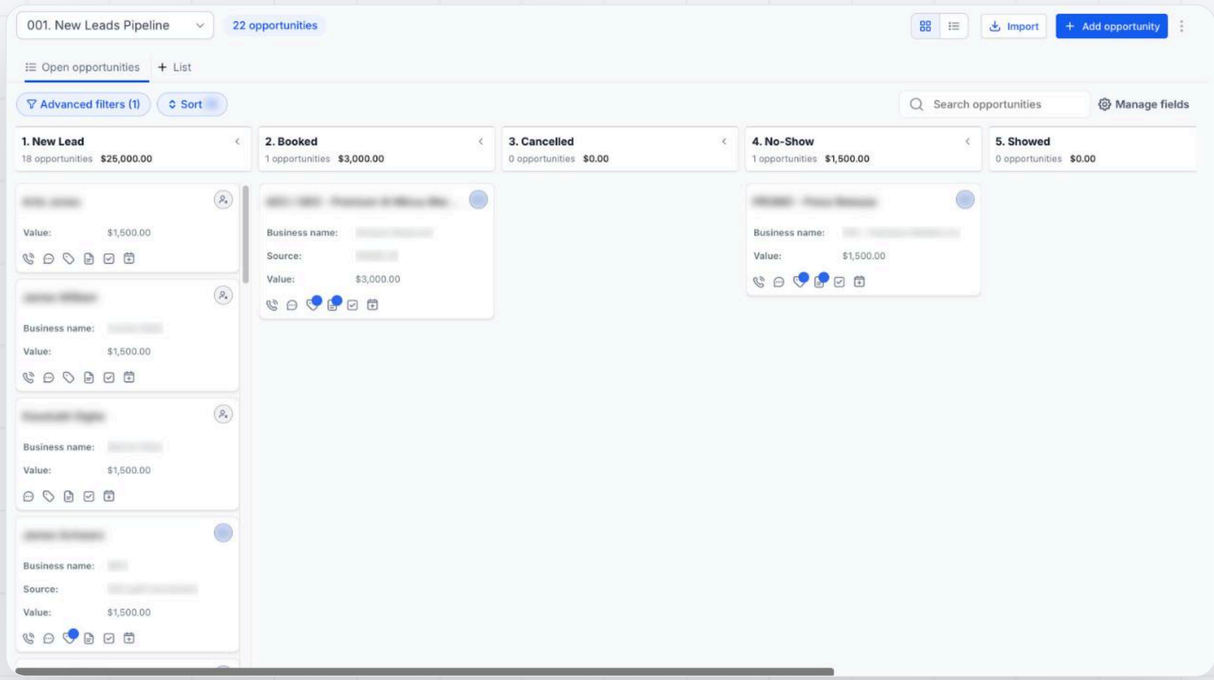


OUTLOOK MEETING TO TASK AND DEAL

WHY NATIVE

One less tool to break

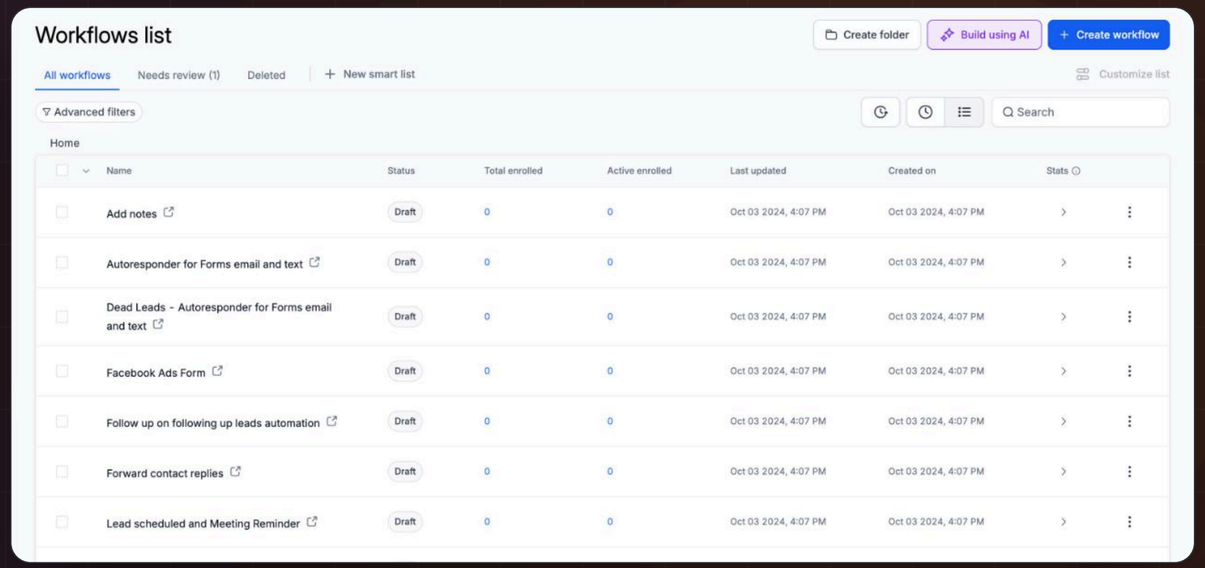
Rebuilt on GoHighLevel's own calendar trigger and actions, replacing an earlier connector-based version, so there is no extra subscription to maintain.



THE AGENCY'S LEAD PIPELINE (CONTACTS AND COMPANIES HIDDEN)

Lead handling for a piling contractor.

A set of seven automations covering the full lead cycle: Facebook ads form intake, instant email and text autoresponders, a separate path for dead leads, follow-up on leads that went quiet, forwarding replies to the team, and meeting confirmation with reminders. Built and left in draft for the client to activate on their own schedule.



THE CONTRACTOR'S LEAD AUTOMATIONS, DELIVERED IN DRAFT

SCOPE

Four accounts, one agency

Newsletter, calendar sync, pipeline and compliance pages, and contractor lead automations, each in the sub-account it belongs to.

IN USE

1,592 sign-ups processed

The opt-in flow has processed 1,592 newsletter sign-ups since February 2025 without a manual step.

CLIENT REVIEW

5.0 on Upwork

The agency that contracted me closed the Upwork contract with a five-star review in June 2025.

STACK

GoHighLevel, end to end

Workflows, forms, funnels, email templates, calendars, pipelines, trigger links and tags. No external tools needed.

LESSON

Consent is a data model

Two tags with dates beat one "subscribed" checkbox. The confirmed segment is what keeps a B2B list deliverable.

LESSON

Build where the client already works

The client already worked from Outlook. Syncing their calendar into the CRM beat asking them to change how they book meetings.

Thank you.

Running client CRMs from one agency account, or need an opt-in list you can prove? Message me and tell me what your sub-accounts need. I will tell you what to build once and what to build per client.

GoHighLevel | Agency accounts | Email compliance | A2P 10DLC | Calendar sync | n8n

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