Automate GLM Follow-Up When a Lead Buys a Trial

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You can use **Kilo-to-GLM automation** to tag a lead in Gym Lead Machine when they start a trial package in Kilo GMS, such as a trial bought through your Sales Portal. That tag can then trigger a Gym Lead Machine workflow that moves the lead to the right pipeline stage, sends a welcome message, and notifies your staff.

> Note
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> Kilo to GLM automations are available only to gyms that have the Kilo–GLM integration enabled. If you do not see **Gym Lead Machine** under **Integrations** in Kilo GMS, contact our Support team to have the integration enabled.

What you can do with a trial purchase automation

- Tag a lead in Gym Lead Machine automatically when their trial package starts
- Move the lead's opportunity to a trial stage in your pipeline
- Send a custom welcome email to new trial members
- Notify a staff member by email when a trial starts
- Check a log of every time the automation ran and whether it succeeded

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How does the trial purchase automation work?

The setup has three parts: a tag in Gym Lead Machine, an automation in Kilo GMS that applies the tag, and a workflow in Gym Lead Machine that runs when the tag is added.

When a lead's trial package starts in Kilo GMS, the automation applies your tag to their Gym Lead Machine contact. The tag triggers your Gym Lead Machine workflow, which handles the pipeline update and follow-up.

Complete the three steps below in order, since each one uses what you set up in the step before it.

Step 1: Create a tag in Gym Lead Machine

1. In Gym Lead Machine, go to **Settings → Tags**.
2. Click **+ Add Tag**.
3. Name the tag something clear, for example, **Trial Purchased**.

4. Save the tag.

You will select this tag in the next two steps.

Step 2: Build the automation in Kilo GMS

1. In Kilo GMS, go to **Integrations → GLM**.
2. On the **Kilo to GLM** tab, click **New Automation**.
3. Select the **Package Started** trigger.
4. Select your trial package. You can select more than one, for example, a "Foundations Trial" and a "2-Week Intro" package.
5. Select the **Add & Update Contact** action.
6. Choose the tag you created in Step 1.
7. Review the summary and click **Save**.
8. Toggle the automation **Active**.

   Note

   Saving an automation does not turn it on. The automation runs only after you toggle it **Active**.

From then on, whenever one of the selected trial packages starts for an athlete, Kilo GMS applies your tag to their linked Gym Lead Machine contact.

Step 3: Connect the tag to a Gym Lead Machine workflow

1. In Gym Lead Machine, go to **Automations → Workflows**.
2. Create a new workflow from scratch.
3. Set the workflow trigger to **Tag Added**.
4. Select the tag you created in Step 1.
5. Add the actions you want the workflow to take.

Common actions for a trial purchase include:

- **Update Opportunity** to move the contact to the trial stage of your pipeline
- **Send Email** to send a custom welcome message

- **Internal Notification**, sent by email, to let a staff member know a trial has started

  Note

  If your pipeline does not have a trial stage, contact our Support team to have a custom stage added to your pipeline.

Frequently asked questions

Why isn't my trial automation running?

The most common reason is that the automation was saved but never toggled to Active. Go to **Integrations → Gym Lead Machine**, find the automation on the **Kilo to GLM** tab, and switch it on. If it is already active, click its execution count to open the log and see what happened each time it fired.

How do I check whether the automation tagged a lead?

Click the execution count on the automation to open its log. Each entry shows the date and time, a status of Success, No Action Taken, or Failed, and a message explaining the outcome. If an entry failed, for example because the Gym Lead Machine tag was deleted, the log includes enough detail to share with our Support team.

Does the lead need to be in Gym Lead Machine before they buy the trial?

No. The Add & Update Contact action creates the matching Gym Lead Machine contact if one does not exist, or updates it if it does, and then applies your tag.

Should I use the Package Started or Package Purchased trigger?

Package Started fires when the package starts, and Package Purchased fires when the package is bought. Both are available as Kilo to GLM triggers. Choose the one that matches when you want your follow-up workflow to begin.

Can I change the trigger, action, or packages after I save the automation?

You can change the packages and the tag, but the trigger and action are locked once the automation is saved. For example, you can add a new trial package to the automation or switch to a different tag. To use a different trigger or action, create a new automation.

How do I pause the automation without losing it?

Toggle the automation off. It stops running but keeps its trigger, action, and settings exactly as you left them, so you can switch it back on at any time. Deleting an automation removes it permanently, including its history.

Helpful tips

- Toggle a new automation **Active** right after you save it
- Select every trial package you offer when configuring the trigger
- Give your tag a name that makes its purpose obvious in Gym Lead Machine
- Keep the tag in Gym Lead Machine for as long as the automation uses it, since a deleted tag causes the automation to fail
- Click the help icon (?) next to a trigger in the builder to see exactly when it fires
- Pause an automation with the toggle rather than deleting it, so you keep its history

When this feature is most helpful

- Following up with every new trial member without manual tagging
- Keeping your pipeline current when leads buy a trial online
- Alerting front desk staff or coaches when a new trial starts
- Sending the same welcome message to every trial member

If you have questions about Kilo-to-GLM automations in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.

- Tags
- Gym Management