Boost Engagement and Improve Retention with Custom Workflows

Laura Gibson - 2026-09-18 - Webinars & Masterclasses

Custom workflow recipes are pre-built Gym Lead Machine workflows that Kilo installs in your account for you to customize. This article covers the recipes for Goal Reviews, the Goal Review follow-up campaign, and the Event Countdown, including how to edit each one and how to add your contacts to it.

To request a recipe, submit the custom workflow recipe request form. Before you do, work through the walkthroughs below so you know how to adapt each workflow to your use case and which steps have to happen for it to run end to end.

Watch: custom workflow recipes overview

What you can do with custom workflow recipes

- Request a template workflow recipe from Kilo
- Edit the email and SMS content in a workflow
- Adjust the wait steps between messages
- Add contacts to a workflow manually for a one-off campaign
- Add contacts automatically as part of your New Client process
- Collect goal-setting information using custom fields
- Merge your custom fields into email content
- Set an event date and follow-up actions on a countdown workflow

---

Goal Review workflows

Goal Review Workflow 1 sends your Goal Review campaign. Goal Review Workflow 2 re-adds contacts to Workflow 1 automatically so the cycle repeats.

Customize Workflow 1 and Workflow 2

The walkthrough covers editing the email content and editing the wait steps, including the options available for each.

Watch: customizing Goal Review Workflow 1 and Workflow 2

If you are using Workflow 2, Goal Review appointments must be marked as **Showed**. That status is the trigger for Workflow 2, and the process stops without it.

Add contacts to the Goal Review workflows

You can add contacts for a one-off Goal Review campaign, or add them automatically as part of your New Client process when a contact is marked as **Won**.

Watch: adding contacts to the Goal Review workflows

Goal Review follow-up campaign

The follow-up campaign sends contacts a message after their Goal Review meeting, using the information you captured during the meeting.

Set up your custom fields

Custom fields hold the goal-setting information you collect in your review meetings, so you can merge it into the follow-up emails later.

Watch: setting up custom fields for goal-setting information

Customize the campaign

The walkthrough covers editing the email content, editing the wait steps, and adding your custom fields into the email content.

Watch: customizing the Goal Review follow-up campaign

Add contacts to the campaign

You can add contacts manually, or add them automatically once their Goal Review appointment is marked as **Showed**.

Watch: adding contacts to the Goal Review follow-up campaign

Event Countdown workflow

The Event Countdown workflow counts down to a date you set and sends messages in the run-up to it.

Edit the workflow

The walkthrough covers setting the event date, editing the wait steps, editing the email and SMS content, and editing the follow-up actions, such as internal notifications or emails to the contact.

Watch: editing the Event Countdown workflow

Add contacts to the workflow

Watch: adding contacts to the Event Countdown workflow

Helpful tips

- Set up your custom fields before you customize the follow-up campaign, so the fields are available to merge into the email content.
- Schedule a recurring weekly reminder for your team to mark Goal Review appointments as **Showed**, which keeps Workflow 2 and the follow-up campaign running.
- Watch the walkthrough for a recipe before you request it, so you know what you will need to edit once it lands in your account.

If you have questions about custom workflow recipes in Gym Lead Machine, our Support team is happy to help. Reach us at **hello@usekilo.com**.

- Tags
- Resources
- Webinar