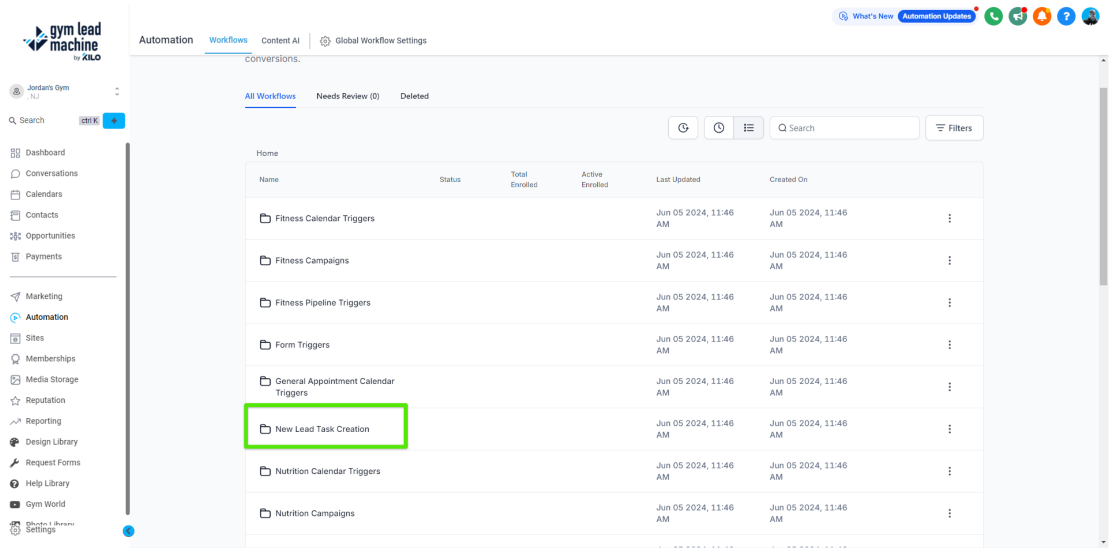
[Knowledge Base](#) > [Gym Lead Machine](#) > [Automation (Workflows)](#) > [How Lead-Nurture Task Automations Work](#)

How Lead-Nurture Task Automations Work

Mavilyn Carlos - 2026-09-07 - [Automation (Workflows)](#)

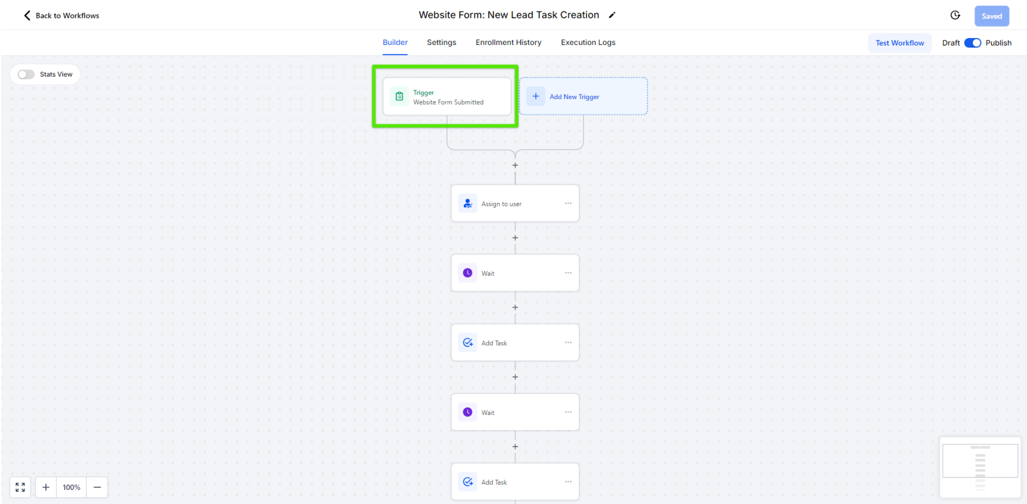
> Need more help? Contact our support team at hello@usekilo.com. We're here for you!

Once a new lead enters your Opportunity pipeline, whether they opt-in through some form on your website or a form on one of your landing pages, along with entering the New Lead workflow campaign that communicates with them, they will also be entered into a New Lead Task Creation workflow. This workflow assigns tasks in GLM reminding a user in your account to call the lead.



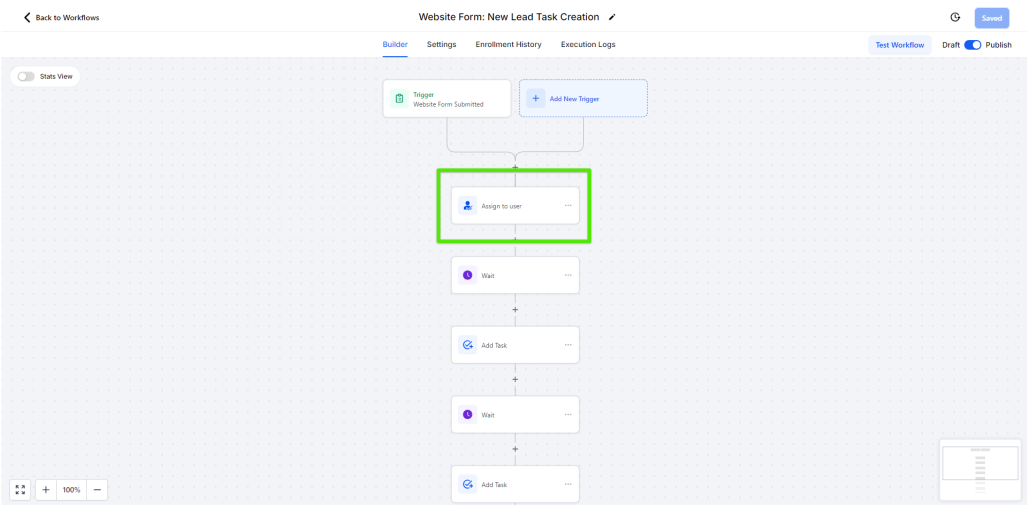
Understanding and editing the New Lead Task Creation workflows

1. The New Lead task Creation workflows are triggered by the lead submitting a specific form in your GLM system (i.e. Website Form, Nutrition Form, Personal Training Form, etc.)



2. The first action of the workflow is to assign the user (staff member) who is responsible for leads of this type.

   To edit the user assigned to leads of this type, simply click on the 'Assign User' action -> remove the user name currently entered -> select a new user. Save the Action and the Workflow before exiting.



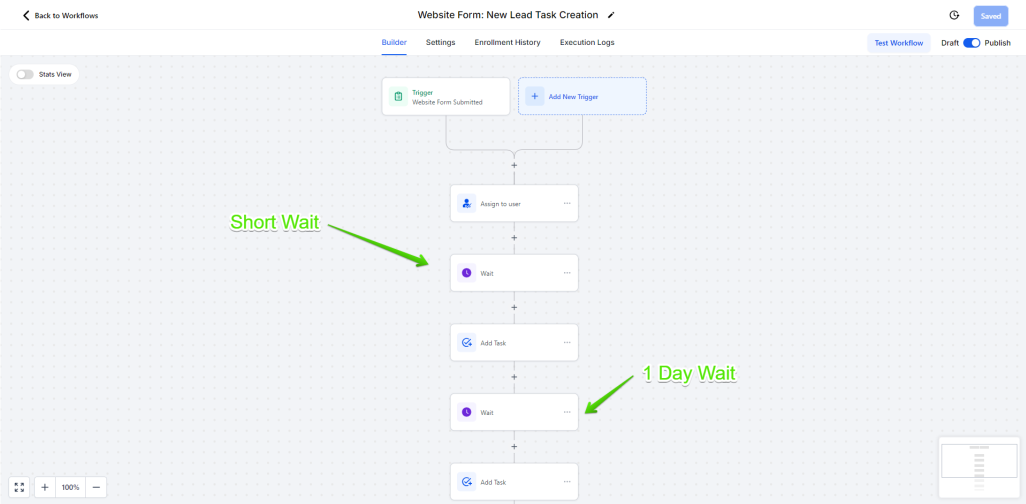
3. Then, that user is assigned a task reminding them to call the lead 1 time per day for the first 3 days after the lead opts in.

   The first Wait step before Task 1 is short to allow the lead time to book. The Wait steps between task 1 & 2 and 2 & 3 are one day each.

   To edit the Wait steps, simply click on the Wait actions and adjust the time frame.

   To edit the Tasks, click on those actions and edit the Task title, details, or due date.

   Save all Actions and the Workflow before exiting.

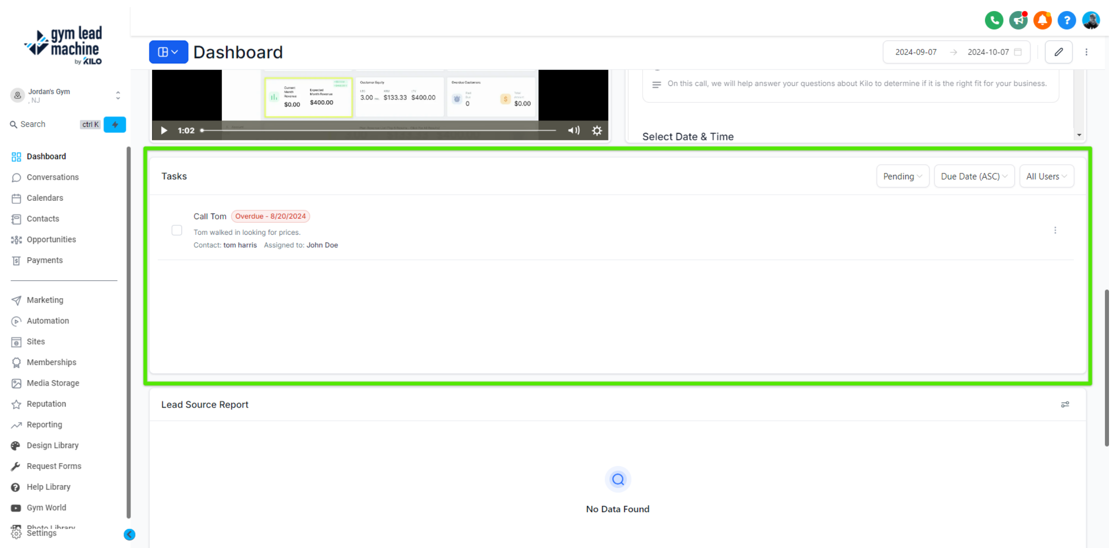


If the lead books an appointment or is updated to the Won, Lost, or Abandoned status they will be removed from the workflow so no other tasks are assigned. This action is managed by a seperate workflow, but it will happen.

Viewing your tasks in GLM

Tasks on the GLM dashboard

When you login to GLM, you can scroll down to the Task list on the Dash.



- Admin in the account see all tasks assigned to an user, and may use the filters to limit the view.

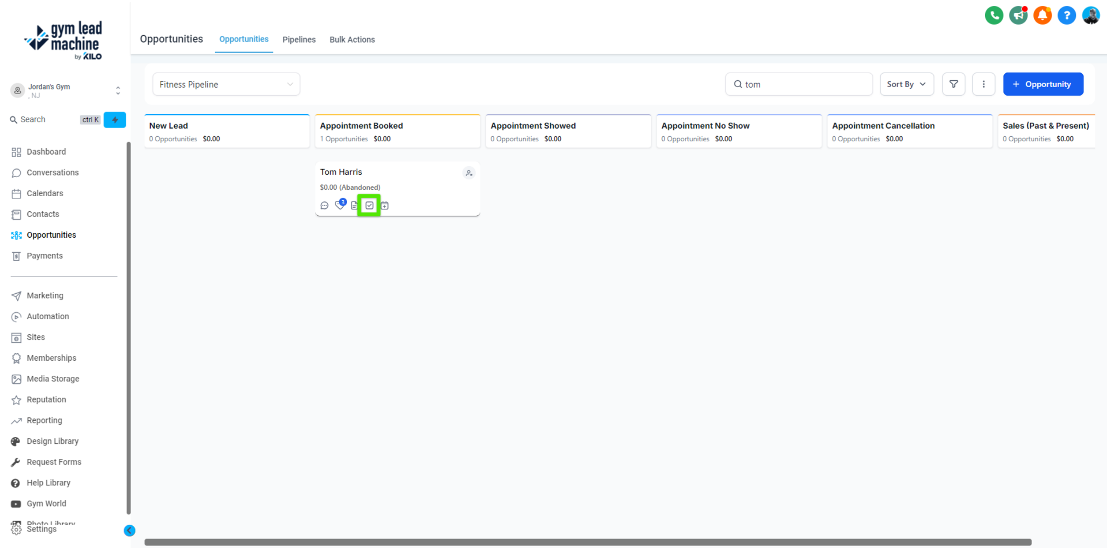
- Users in the account see only tasks assigned to them.

- Once you've called the lead, check off the task. If the lead does not book an appointment during the first 3 days, tasks will continue to be assigned.

Tasks on the Contact or Opportunity cards

You can also view Tasks in a more contact-specific manner by checking the Tasks on a

Contact or Opportunity card. Select the icon highlighted below and a pop-up will appear with the tasks related to the contact. You can check off completed tasks or assign new ones from the pop-up.



By searching for a contact in the Contacts section of GLM, and clicking on their name, you enter their Contact card. You will find similar capabilities to the pop-up mentioned above by clicking on the Tasks tab in the right column.