Track Client Milestones with Workflows

Mavilyn Carlos - 2026-09-08 - Automation (Workflows)

Client milestones are a great opportunity to strengthen relationships and increase retention in your gym. With **Workflow Flows in Gym Lead Machine (GLM)**, you can automatically trigger reminders, tasks, and messages when a lead becomes a paying client.

Many gyms use these workflows to celebrate milestones such as:

- First week check-ins
- 30 days as a member
- 90 days as a member
- 6 months or 1 year anniversaries

This guide will walk you through creating a workflow in GLM that begins when an Opportunity is marked as Won, indicating they've become a **new client,** and then triggers milestone messages or reminders over time.

Step 1: Create a New Workflow

1. Log in to your **Gym Lead Machine** account.
2. Navigate to **Automation** in the left-hand menu.
3. Click **Add Workflow**.
4. Select **Start from Scratch**.
5. Enter a **Workflow Name**.

Example: Client Milestones Workflow

Step 2: Set Workflow Settings

To ensure emails from this workflow deliver as expected, click on

Settings

in the Workflow.

1. Scroll to

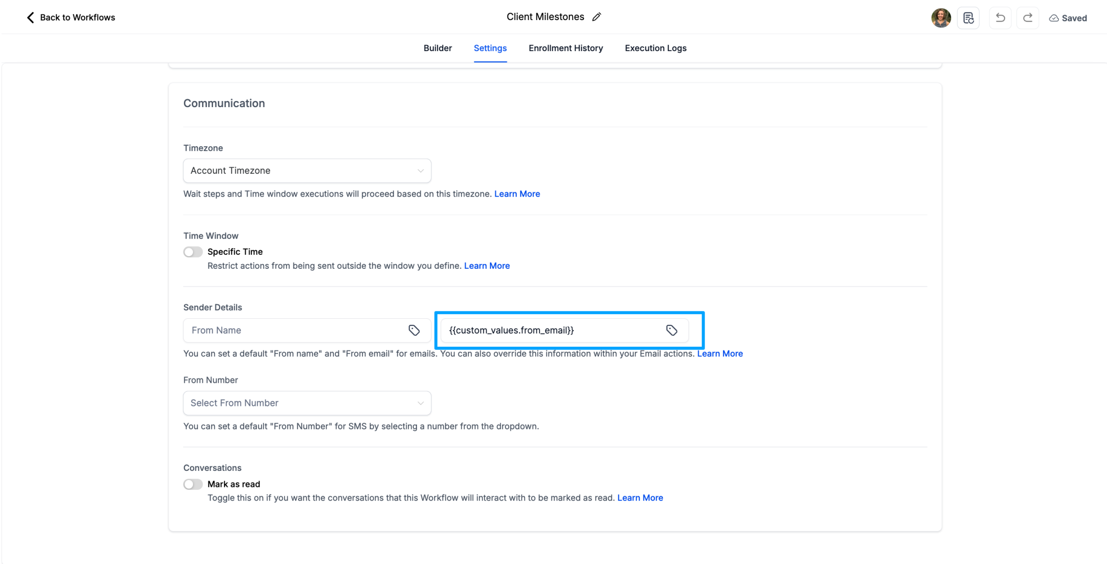
   Sender Details

2. In the field

   From Email

   , enter the custom value {{custom_values.from_email}}.

   1. You may leave the From Name field blank, which allows the system to automatically fill in your GLM account name.



‼️ **Important Note:** Leave the From Name and Email fields in any email actions *blank* so the system defaults to the options you have set in this step.

You have the *option* to control when messages from this workflow are sent using the

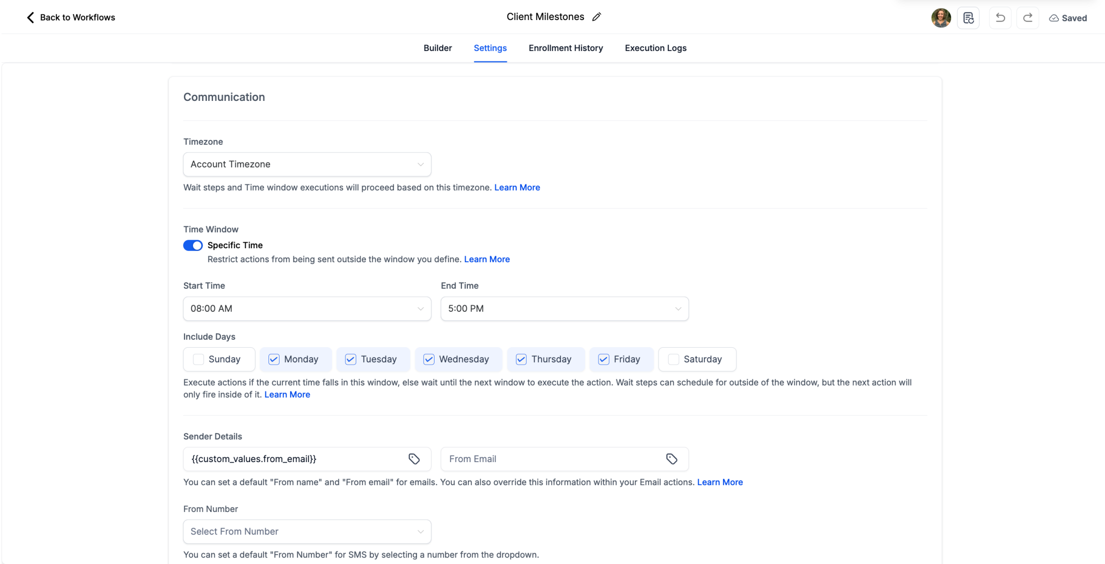
Time Window

settings.

1. To enable, toggle on Specific Time.

2. Enter the time frame in which it is acceptable for these workflow actions to send

3. Select or deselect specific days of the week



Step 3: Set the Workflow Trigger

The trigger determines when someone enters the milestone workflow.

1. Click **Add Trigger**.

2. Search for and select **Opportunity Status Changed**.

Optional: Limit to a Specific Pipeline

If you only want this workflow to apply to a specific pipeline:

1. Add the filter **In Pipeline**.

2. Select the pipeline you want the workflow to apply to.

If you want this workflow to apply to **all new clients regardless of pipeline**, you can skip this step.

Add the Status Filter

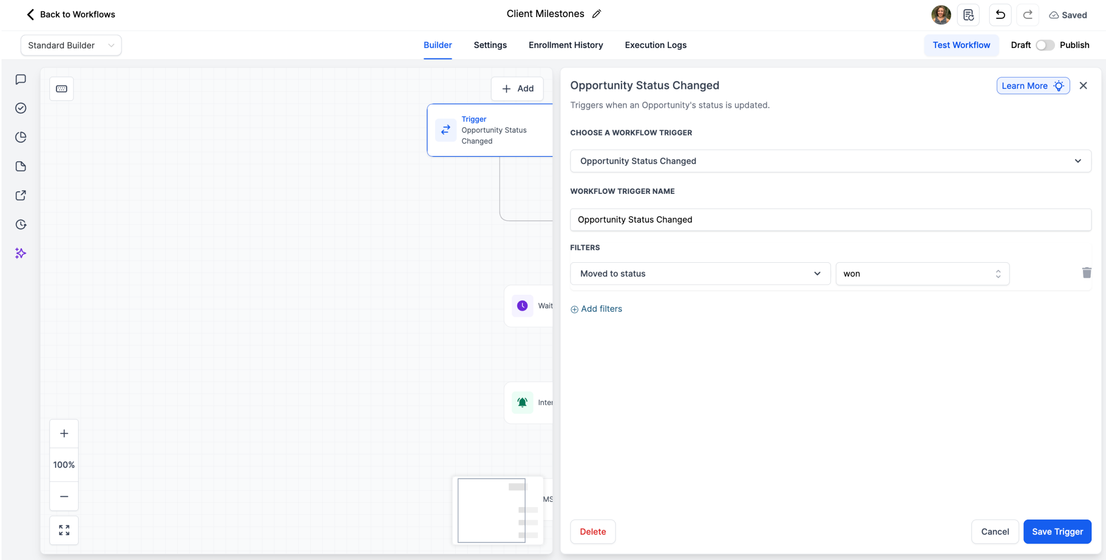
Next, define when the workflow should start.

1. Add the filter **Moved to Status**.

2. Select **Won**.

This means the workflow will begin **as soon as you mark an opportunity as Won**, indicating that the lead has become a paying client.

1. Click **Save Trigger**.



Step 4: Add Workflow Actions

After the trigger is set, you can begin adding the actions that will occur throughout the client lifecycle.

Tip: Remember to save each action as you create it! If AutoSave is not enabled in your GLM, also save periodically as you work.

Action: Wait

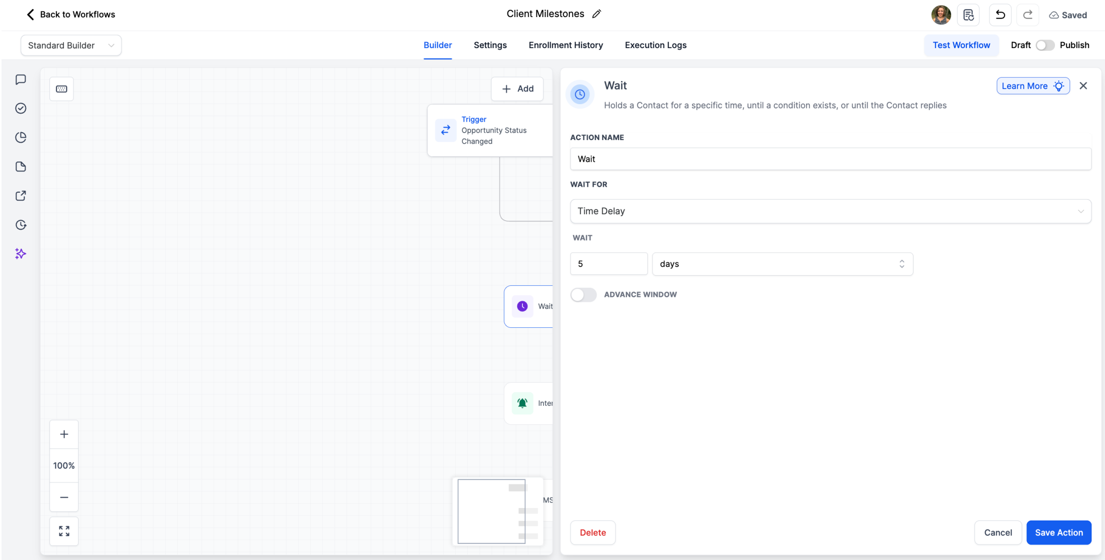
The **Wait** action pauses the workflow for a specified amount of time before the next step occurs. Most milestone workflows start with a Wait step, since the client enters the workflow immediately after being marked as Won.

1. Click **Add Action**.
2. Search for and select **Wait**.
3. Enter the number of days, weeks, or months to wait.

Example:

- Wait **30 days** for a first-month milestone
- Wait **90 days** for a three-month milestone

You can add multiple wait steps throughout the workflow to create a timeline of milestones.



Action: Send Internal Notification

Internal notifications alert your team when a milestone occurs.

These can be sent as:

- Email
- GLM in-app notification (labeled **Notification**)
- SMS
- WhatsApp, in enabled

To create one:

1. Click **Add Action**.
2. Select **Send Internal Notification**.
3. Choose the notification format.
4. Select the **recipient** (coach, GM, or team member).
5. Write the notification message.

Tip

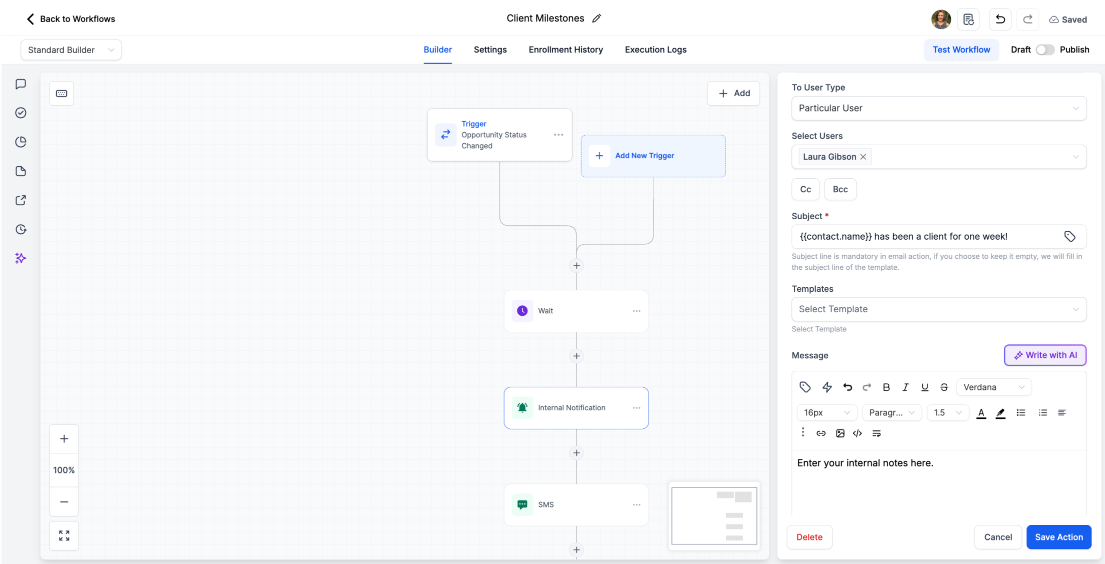
Internal notifications work best when they clearly tell staff what to do.

Example:

> *“Sarah just reached her 90-day milestone. Send her a quick message*

congratulating her and ask how training has been going."

Staff can follow up with a phone call, message, or even celebrate the milestone in person.



Action: Add Task

Tasks can be assigned to specific team members and will appear in their **GLM task list**.

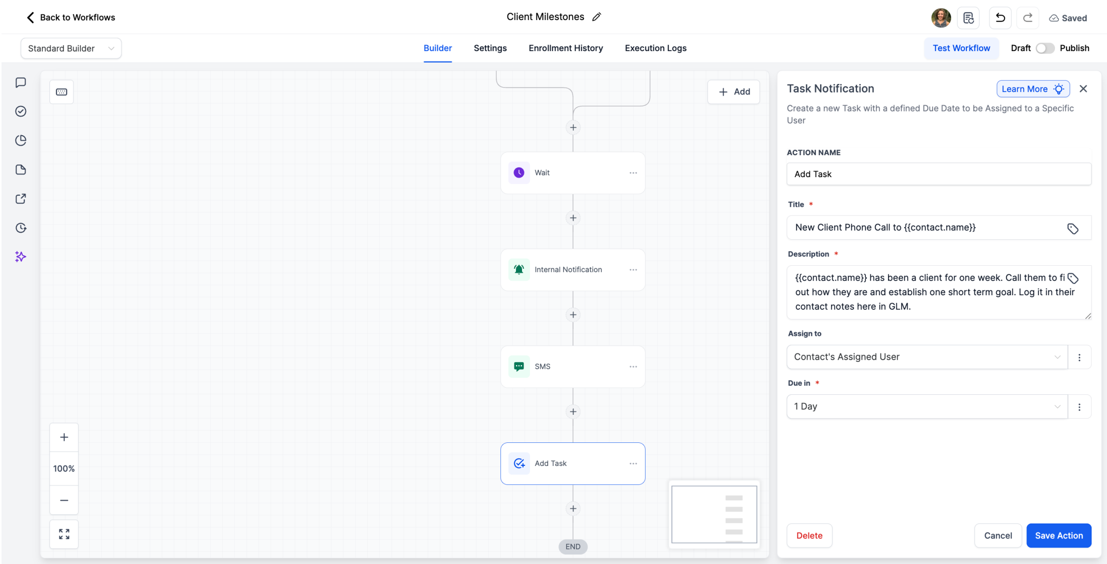
This is helpful for milestone-related action items.

To add a task:

1. Click **Add Action**.
2. Select **Add Task**.
3. Assign the task to a team member.
4. Enter the task description and due date.

Example tasks:

- Deliver welcome swag
- Schedule a check-in call
- Send a handwritten thank-you card



Action: Send Email

You can also send automated milestone emails directly to your clients.

1. Click **Add Action**.
2. Select **Send Email**.
3. Enter the **subject line**.
4. Write the **email body**.

Example message:

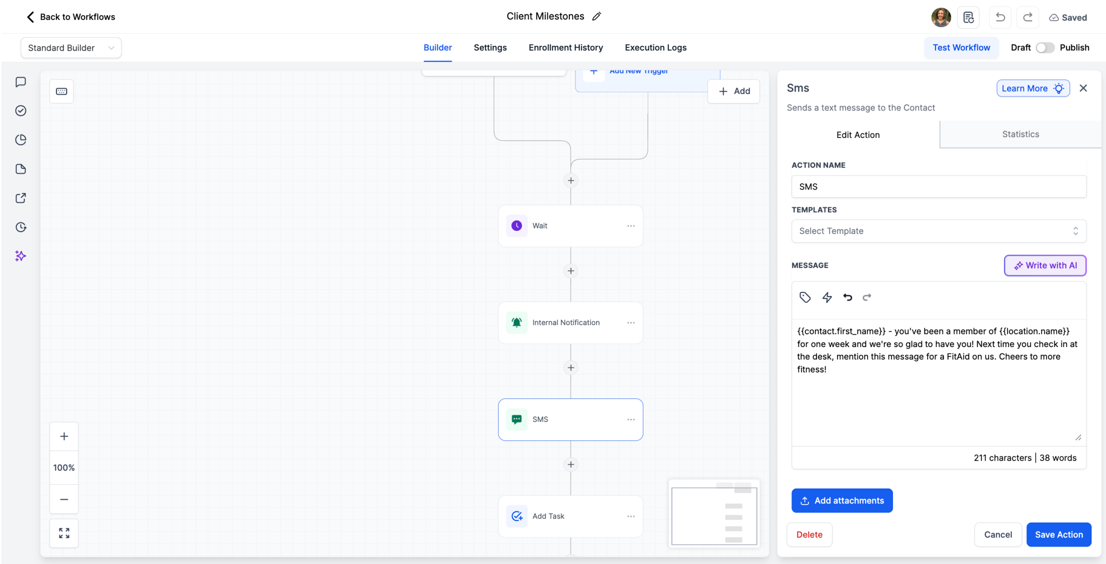
> *“Congratulations on your first 90 days at the gym! We’re proud of the consistency you’ve shown and are excited to keep helping you reach your goals.”*

Action: Send SMS

You can send text messages directly to clients as part of the milestone workflow.

1. Click **Add Action**.
2. Select **Send SMS**.
3. Write your message.

Important: SMS messages count toward your monthly SMS segment usage, which is limited to 1,200 segments per month before overage fees apply.



Step 5: Save and Publish the Workflow

Once you've built your workflow:

1. Click **Save**.
2. Click **Publish**.

From this point forward, contacts will be added to the workflow whenever you mark their opportunity as **Won**.

How Clients Enter the Milestone Workflow

Based on your trigger settings:

- Contacts enter the workflow **when their opportunity is marked as Won**.
- This indicates they have officially become a client.
- The workflow then runs automatically, sending notifications, tasks, and messages according to the timeline you created.

If you need help setting up milestone workflows, our support team is happy to assist. Email hello@usekilo.com for support.