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Use Opportunity Actions in Workflows

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Here we'll walk through how to use a couple of the **Opportunity Actions** inside a Gym Lead Machine workflow — specifically for a scenario where someone walks into your gym and wants to meet with a coach for a **No-Sweat Intro**.

This is just one example of the many ways you could use these Opportunity Actions.

Step 1: Access the Workflow

First, head over to **Automations** and open the workflow that gets triggered when someone books a No-Sweat Intro at your gym.

Step 2: Check for an Existing Opportunity

Before creating a new opportunity, it's a good idea to check if one already exists for this lead:

1. Add a "**Find Opportunity**" action to your workflow.
2. Choose the appropriate pipeline (e.g., **Fitness Pipeline**).
3. If the contact already has an opportunity in the pipeline, proceed to update it.

Step 3: Update the Opportunity

If an existing opportunity is found:

1. Use the "**Update Opportunity**" action.
2. Move the opportunity to the stage called **Appointment Booked** (or whatever matches your gym's process).

Step 4: Create a New Opportunity if None Exists

If no opportunity is found:

1. Use the "**Create Opportunity**" action.
2. Assign it to your **Fitness Pipeline**.
3. Set the opportunity stage to **Appointment Booked**.

Step 5: Continue the Workflow

From here, you can:

- Continue with your normal automation steps like sending reminders, assigning tasks, or notifying your team.
- Ensure the branch of the workflow handles both outcomes: updating existing opportunities and creating new ones when needed.

This setup helps keep your sales pipeline organized and ensures every walk-in lead gets tracked properly. Let us know if you need help customizing your pipeline or automations!