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Use Workflows with Membership Courses in GLM

Mavilyn Carlos - 2026-08-21 - Memberships & Communities

Workflows are the communication hub of your Gym Lead Machine account, and several of them are built specifically around Memberships. You can start a Workflow when someone finishes a course, and you can grant or revoke access to a Membership Offer as the result of a Workflow, so course access stays in step with a contact's tags and status without anyone updating it by hand.

What you can do with Workflows and Memberships

- Start a Workflow when a contact completes a lesson, a category, or a whole Product
- Grant access to an Offer automatically when a tag is added
- Revoke access to an Offer when a tag is removed or a client cancels
- Revoke access to several Offers in a single Workflow
- Alert yourself by push notification, email, or SMS when someone finishes a course
- Send follow-up messages to leads while skipping existing customers

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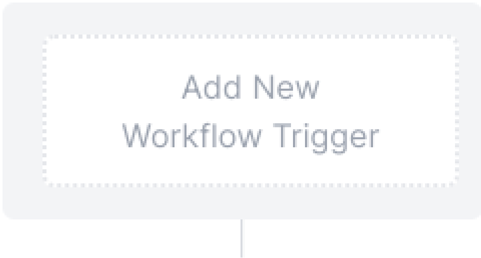
Find the Membership triggers

A trigger is the action that sets a Workflow sequence in motion.

1. Go to **Automation** in the left menu of your account.
2. Click **Create workflow** in the upper right.
3. Select **Start from scratch**.
4. Click **Add New Workflow Trigger**.



5. Scroll down the trigger menu to the **Membership** heading.

Everything listed under that heading is a Membership event that can start a Workflow.

Find the Membership actions

An action is what the Workflow does once a trigger fires.

1. Go to **Automation**, click **Create workflow**, and select **Start from scratch**.

2. Add the trigger you want, for example a contact tag being added.

3. Click **Add your first action**.

4. Scroll down the action menu in the left sidebar to the **Membership Actions** heading.

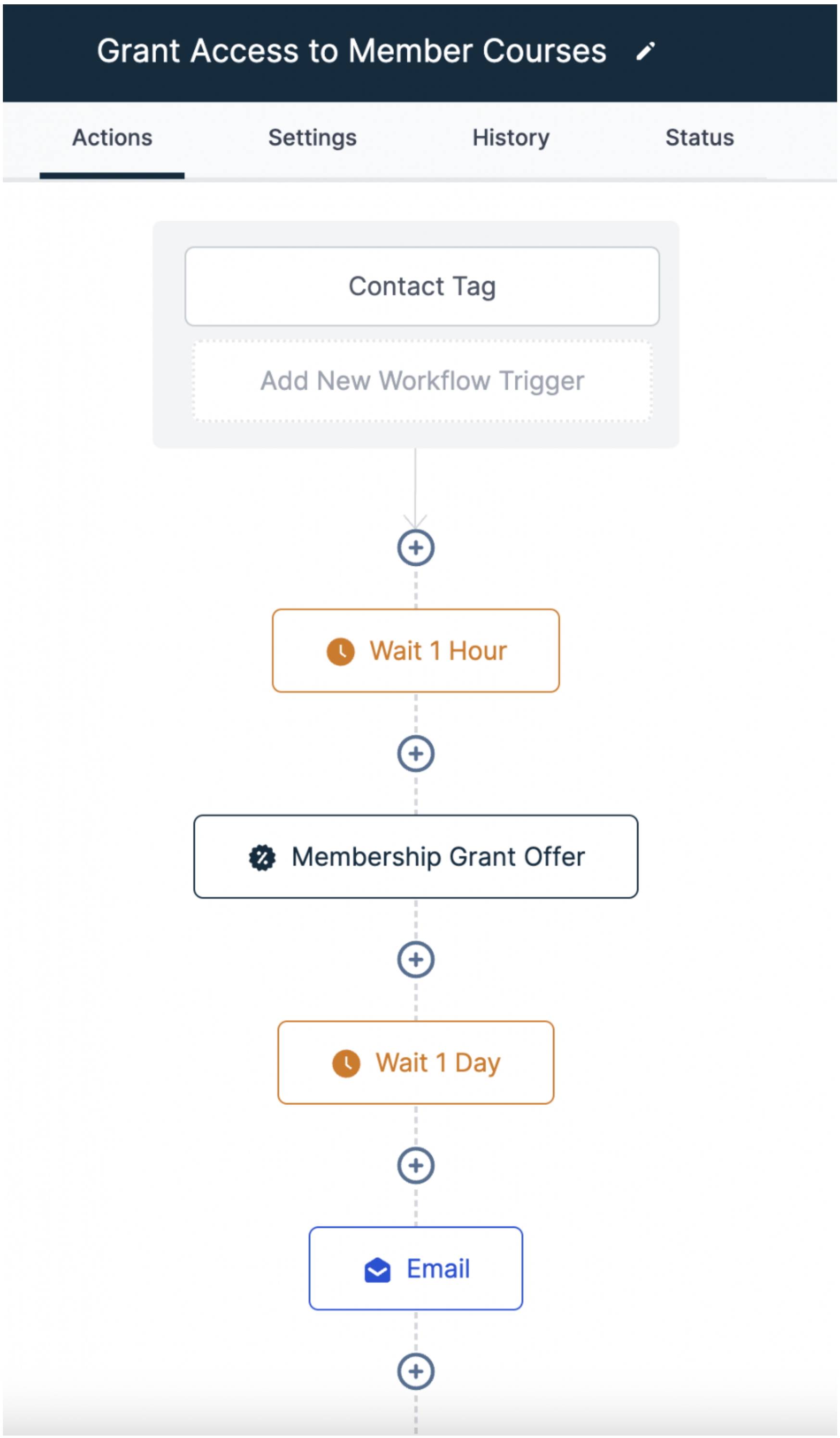
Below that heading are the two Membership actions: **Membership Grant Offer** and **Membership Revoke Offer**.

Common Membership Workflow setups

Grant access to an Offer when a tag is added

Use this when you want to give current clients access to a course as part of what they already pay for.

1. Create a Workflow from scratch.
2. Set the trigger to **Contact Tag → Tag Added** and select the tag, for example **client**.
3. Add the action **Membership Grant Offer**.
4. Select the Offer to grant.
5. Save, then publish the Workflow.



To take access away again when the tag comes off, build a second, separate Workflow using **Contact Tag → Tag Removed** as the trigger and **Membership Revoke Offer** as the action.

Note

Granting and revoking are two separate Workflows. One Workflow cannot both add and remove access based on the same tag.

Revoke access to an Offer when a client cancels

1. Go to **Automation** and create a new Workflow from scratch.
2. Set the trigger to **Contact Tag → Tag Added** and select the tag **fitness cancelled client**.
3. Add a second trigger for the tag **nutrition cancelled client** if you run both pipelines.
4. Click to add the first action and search the left sidebar for **Membership Revoke Offer**.
5. Select the Offer that should be revoked when someone cancels.
6. Add more **Membership Revoke Offer** actions for any other Offers that should be revoked.
7. Save your actions as you work, then publish and save the Workflow.

Follow up when someone finishes a course

Use this when a course is acting as a lead magnet and you want to reach people while the material is fresh.

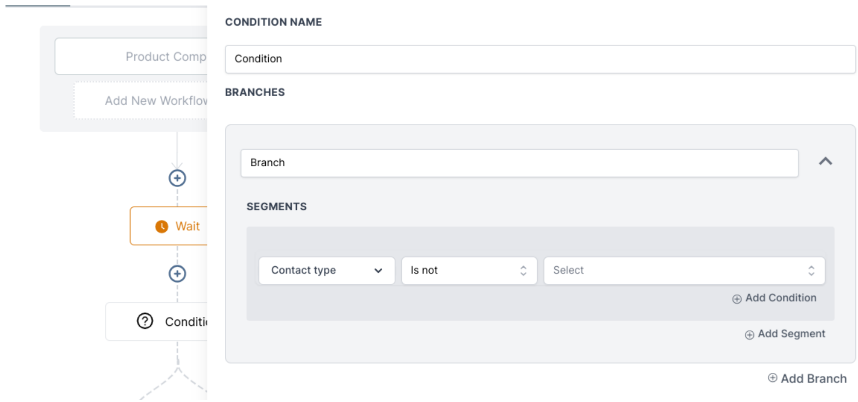
1. Create a new Workflow with the trigger **Product Completed**.
2. Add **Internal Alert** as the first action to notify yourself by push notification, email, or SMS so you can reach out personally.
3. Add **Send Email** or **Send SMS** instead if you would rather the Workflow contact the person directly.

To reach out partway through instead of at the end, use **Category Completed** or **Lesson Completed** as the trigger.

Send follow-ups to leads but not to existing customers

If the same course is taken by both leads and current clients, an If/Else condition keeps your upsell messages away from people who have already bought.

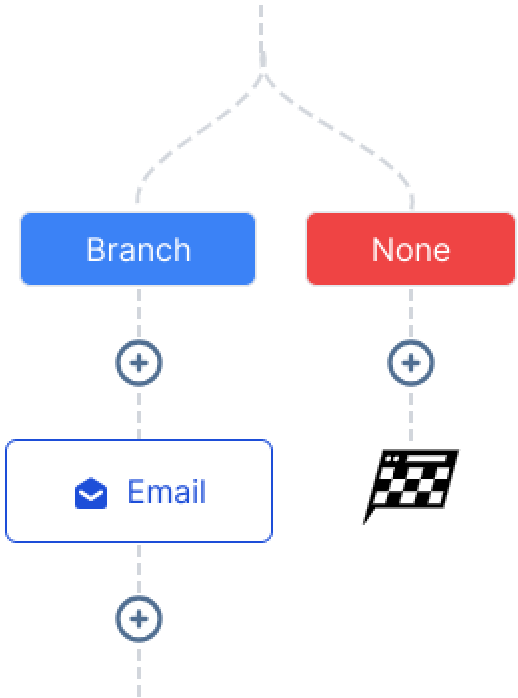
1. Add your trigger, for example **Product Completed**.
2. Add a **Wait** step as the first action. It can be short, and one minute is enough.
3. Add an **If/Else** action.
4. In Segments, select **Contact details → Contact type**, then **Is Not**, then **Customer**.



5. Save the If/Else action. Two branches appear below it.

6. Add your follow-up actions to the blue **Branch** line, which carries contacts who match the condition and are therefore not customers.

7. Leave the red **None** line empty. Contacts who do not match reach the checkered flag and exit the Workflow.



Frequently asked questions

What is the difference between the blue Branch line and the red None line?

The blue Branch line is for contacts who match your condition, and the red None line is for everyone who does not. Put your follow-up actions on the Branch line. Contacts sent down the None line simply reach the checkered flag and are removed from the Workflow, so it can stay empty.

Can one Workflow revoke access to more than one Offer?

Yes. Add a separate **Membership Revoke Offer** action for each Offer you want removed, then save and publish once.

Can I contact someone before they finish the whole course?

Yes. Use the Category Completed or Lesson Completed trigger instead of Product Completed. This lets you check in at a milestone partway through rather than waiting for the final lesson.

Helpful tips

- Build granting and revoking as two separate Workflows so each one stays easy to read
- Save your actions as you go, then publish and save at the end
- Use **Internal Alert** when you want to make the follow-up call yourself, and **Send Email** or **Send SMS** when the message can go out automatically
- Add both the fitness and nutrition cancellation tags as triggers if you run both pipelines
- Check that the tag names in your Workflow match the tags actually in use on your contacts

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If you have questions about using Workflows with Membership courses in Gym Lead Machine, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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