

WORK SAMPLE · GOHIGHLEVEL + SERVICEM8 · REALISTIC DATA · SHEET 01/03 · REV 1 · 28 OCT 2026

WORK SAMPLE · CRM, FIELD SERVICE & ACCOUNTS

Booked means *booked*: GoHighLevel + ServiceM8 pipeline sync

How I'd approach a multi-state plumbing and electrical business whose CRM marks jobs Booked too early and keeps creating duplicate contacts.

AREA	TOOLS	TYPICAL SCOPE	TIMELINE
CRM ↔ field service	GoHighLevel · ServiceM8 · Xero · Zapier	US\$2,500–4,000	About 4 weeks

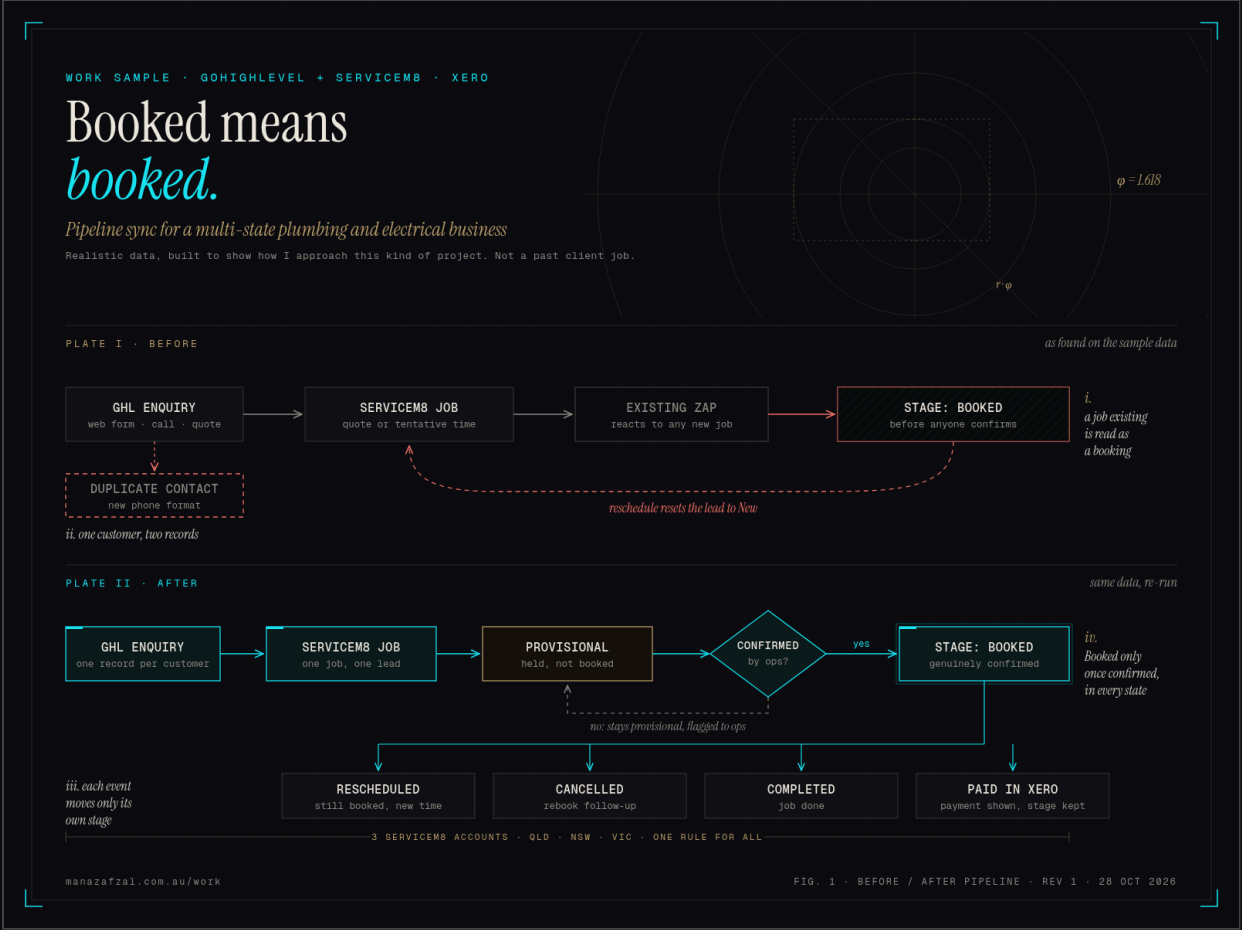
01 The problem

REALISTIC DATA SET

A trades business runs plumbing and electrical crews in Queensland, New South Wales and Victoria, with one ServiceM8 account per state and a single GoHighLevel pipeline for sales. The automations added over time react to a job **existing**, not to a booking being **confirmed**, so the pipeline says Booked while the job is still a quote or a tentative time.

WHAT OWNERS USUALLY NOTICE	EFFECT ON THE BUSINESS	SAMPLE DATA
Leads show Booked with no confirmed booking	Follow-ups stop and leads go cold	214
The same customer appears twice	Sales and ops work different records	167
Cancelled jobs still sitting at Booked	No rebook follow-up goes out	23
A reschedule sends the lead back to New	History lost, wrong messages sent	31
Only one state account is connected	Two states invisible in the pipeline	1 of 3

FIG. 1 · BEFORE AND AFTER, AT OUTCOME LEVEL



02 How I approach it

WHAT, NOT HOW

1 · AGREE WHAT BOOKED MEANS

Owner, sales and ops agree one plain-English meaning for each stage before anything changes. Booked means a job ops has genuinely confirmed. Everything else is held as Provisional.

2 · ONE CUSTOMER, ONE RECORD

New activity joins the existing customer instead of creating another. Existing duplicates go on a review list for a person to decide, never merged blindly.

3 · EACH EVENT MOVES ONLY ITS OWN STAGE

A reschedule keeps the booking and updates the time. A cancellation starts a rebook follow-up. A completed job or a payment in Xero updates what it should and nothing else.

4 · EVERY STATE, IN LOCAL TIME

All three ServiceM8 accounts follow the same rules, and every booking shows in the customer's local time, including Queensland, which has no daylight saving.

5 · FAILURES ARE SEEN THE SAME DAY

Anything that fails, or a booking that waits too long, lands on one Needs attention list and alerts the person you choose.

6 · NOTHING IS SWITCHED OFF BLIND

Old automations are paused, not deleted, at a quiet time you choose, with a rollback list ready.

03 Scope

TYPICAL FIXED-PRICE PROJECT

SCOPE AREA	INCLUDED
Health check	Every automation, account and stage reviewed; findings with business effect and a fixed quote
Stage design	Agreed stage meanings and follow-up behaviour for sales, ops and owner
Sync across three states	GoHighLevel kept in step with all ServiceM8 accounts; payments reflected from Xero
Clean-up	Open jobs linked to the right lead; duplicates and wrong stages listed for your approval
Go-live and watch	Tested switch-over, two-week watch, handover pack and recordings
Not included	Replacing GoHighLevel or ServiceM8, website forms, accounting work inside Xero

MILESTONES

MILESTONE	OUTCOME YOU CAN CHECK	SHARE
M1 · Systems Health Check	Findings, stage map and fixed quote	US\$300
M2 · Stages and sync	All three states syncing on test records	~40%
M3 · Clean-up and testing	40 of 40 scenarios pass; clean-up list approved	~45%
M4 · Go-live and handover	Switch-over done, two-week watch closed	~15%

The fixed quote follows a US\$300 Systems Health Check, so the price is based on what's actually in your accounts.

TIMELINE

WEEK 1

Health check, stage meanings agreed, fixed quote.

WEEK 2

Sync running on test records in all three states.

WEEK 3

40 scenarios run; clean-up list approved by you.

WEEK 4

Switch-over at a quiet time; two-week watch begins.

04 Outcome checks

SAME SAMPLE DATA, RE-RUN

MEASURE	BEFORE	AFTER
Booked with no confirmed booking	214	0
Duplicate contacts created	167	0 (existing ones on review list)
Cancelled, still at Booked	23	0
Reschedules reset to New	31	0
State accounts syncing	1 of 3	3 of 3
Bookings at the wrong local time	38	0
Paid shown before Xero paid	19	0
Failures alerted the same day	0 of 12	12 of 12

TEST SCENARIO GROUP	COUNT	PASS WHEN	STATUS
Provisional	6	Never reaches Booked; flagged if it waits too long	PASS
Confirmed, per state	6	Booked only once ops confirms, in each account	PASS
Rescheduled	6	Stays Booked; time and reminder move	PASS
Cancelled + rebooked	6	Rebook follow-up starts; no stale reminder	PASS
Completed + paid in Xero	6	Paid shows only once Xero says paid	PASS
Duplicates + repeats	6	Nothing new is created; no wrong stage change	PASS
Failures + alerts	4	Alert raised the same day; safe to re-run	PASS
Total, across all 3 accounts	40	40 of 40 pass before switch-over	

GO-LIVE GATES

Everything backed up	Backup confirmed, with record counts
Open jobs linked	Every open job linked to its lead, or on a review list with a reason
Stage fixes approved	Every stage that would change is listed and approved by the owner first
Two-week watch	Alerts and stuck bookings checked daily; any misfire fixed in the watch window

05 Handover

In this work sample, the handover is what the team keeps using after I step away, written for the people who run the business, not for whoever set it up.

IN YOUR ACCOUNTS

Cleaner pipeline with state views, stages that match reality, a Needs attention list and alerts.

ON PAPER

Stage guide in plain English, a register of every connection, and the signed 40-scenario test log.

FOR THE TEAM

Two short walkthrough recordings and a one-page sheet for what to do when an alert arrives.

TYPICAL SCOPE FOR THIS KIND OF PROJECT	US\$2,500–4,000	/WORK/GHL-SERVICEM8-PIPELINE-SYNC/
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