

# GHL Automation Troubleshooting — Wrong Contacts Receiving Workflows

## Overview

Sometimes GHL automations/workflows fire on contacts who should NOT be receiving them — for example, clients who have already completed onboarding receiving messages telling them to complete onboarding. This page explains what to do when you notice this happening.

## Common Scenarios

- **Onboarding automation sent to already-onboarded clients** — Client completed onboarding and orientation, but still receives automated messages asking them to complete it
- **Follow-up sequences firing after a client is already active** — Drip campaigns continue even though the client has moved past that stage
- **Reactivation messages sent to active clients** — Clients who are paying and enrolled receive win-back messages

## What to Do (Team Members)

1. **Do NOT try to fix the automation yourself.** GHL has 536 workflows (402 active). Touching the wrong one can break things for hundreds of clients.
2. **Report it immediately in #improvement-requests.** Include:
  - The client name or contact ID affected
  - What message/automation they received (screenshot if possible)
  - What stage the client is actually in (e.g., "already completed onboarding")
  - When you noticed it
3. **Tag @Sam** — Sam manages GHL automations and can diagnose the workflow trigger.
4. **Reassure the client if they respond confused.** Use this script:



"Hi [Name], we apologize for the confusion! That message was sent in error — our records show you have already completed [onboarding/orientation/etc.]. Please disregard that message. Your account is in good standing and our team is actively working on your file. Thank you for your patience!"

## What Causes This

- **Contact not moved to the correct pipeline stage** — If a contact stays in an earlier stage, the automation for that stage keeps firing
- **Workflow trigger conditions too broad** — The workflow may not have proper exclusion filters (e.g., "only fire if contact has NOT completed onboarding")
- **Manual pipeline move was missed** — Someone forgot to move the contact to the next stage after completing a step
- **Tag-based triggers misapplied** — Contact has or is missing a tag that controls workflow enrollment

## For Admins (Sam / Jethro)

- Check the workflow trigger conditions — add exclusion filters for contacts who have already passed the relevant stage
- Verify pipeline stage automation — ensure "move to next stage" actions are firing correctly
- Audit affected contacts — check if this is a one-off or affecting multiple clients
- If multiple clients affected: pause the workflow, fix the trigger, then re-enable

## Prevention

- Always move contacts to the correct pipeline stage after completing any milestone
- When onboarding is complete, verify the contact has the correct tags and stage before moving on
- If you notice a pattern of automation misfires, report it — even if it seems minor. Small issues compound.

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