

GHL Pipeline — Stale Leads (Promise to Pay & Closed) in No-Answer Pipelines

Problem

Leads with a "**Promise to Pay**" status are still appearing in the **No-Answer pipelines**. This causes reps to re-contact leads who have already committed to paying, creating a confusing and unprofessional experience.

Why This Happens

GHL pipelines and workflow automations can conflict when a lead's pipeline stage is updated manually (e.g., moved to Promise to Pay) but the automated no-answer follow-up sequence was already triggered and not stopped.

How to Fix (Admin/Ops)

1. **Add an exclusion filter** to all No-Answer workflows: Pipeline Stage IS NOT "Promise to Pay"
2. **Add a workflow trigger:** When a lead moves to "Promise to Pay" → automatically remove them from the No-Answer sequence/campaign
3. **Audit existing leads:** Run a filter in GHL → Contacts → Pipeline Stage = Promise to Pay → check if any are still enrolled in No-Answer automations → remove manually

For Reps

If you see a lead in your No-Answer queue that you know has already committed to paying:

- **Do NOT call them again** about the missed payment — this damages trust

- Post in **#improvement-requests** tagging @Ops with the contact name so the automation can be fixed
- If the lead hasn't actually paid yet and the promise window has passed (48+ hours), you may follow up once

Prevention

- Always update the pipeline stage **immediately** when a lead promises to pay
- Ops team should audit No-Answer automations monthly to catch these overlaps

Closed / Disqualified Leads Still in No-Answer Pipelines

Reported Apr 21, 2026 (Paul Adrian): Leads that were closed out (e.g. no-show final, disqualified, not interested) are still reappearing in no-answer pipelines the next day.

Root Cause

Same pattern as Promise-to-Pay overlap: the no-answer workflow does not auto-remove a contact when their opportunity status moves to *Lost*, *Abandoned*, or *Closed*. The automation only keys off pipeline *stage*, not opportunity *status*.

Fix (Admin/Ops)

- Add exclusion to all No-Answer workflows: **Opportunity Status IS NOT Lost AND Opportunity Status IS NOT Abandoned**
- Add workflow trigger: **When Opportunity Status = Lost/Abandoned → remove contact from all No-Answer sequences**
- Run daily audit filter: Opportunity Status = Lost + Active in No-Answer automation → bulk remove

For Reps

- If you see a lead in your no-answer queue that you closed yesterday, do **not** re-contact. Post in `#improvement-requests` tagging @Ops with the contact name and the date you closed it.
 - Confirm the opportunity was moved to *Lost/Abandoned* status (not just the stage) — this is what the automation reads.
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