ASCENDYX

# Building Systems That Scale

CRM Architecture • Workflow Automation
Funnels • Booking Systems

Launch Bold. Grow Smart. Experience
**Growth to the Power of X**

www.ascendyx.com

# TABLE OF CONTENTS

Executive Summary ..... 2

**SECTION 1 — AUTOMATIONS & WORKFLOWS**

AscendyX Automation Scorecard System ..... 3

AscendyX Quiz Funnel Automation ..... 4–5

Client Case Study — Yum Street Automation ..... 6–10

**SECTION 2 — FUNNEL & LANDING PAGE SYSTEMS**

Automation Scorecard Landing Page ..... 11

Quiz Funnel Landing Page ..... 12

**SECTION 3 — EMAIL AUTOMATION & HTML/CSS TEMPLATES**

Messenger Entry Funnel Workflow ..... 13

HTML/CSS Email Templates ..... 14

**SECTION 4 — CRM & PIPELINE ARCHITECTURE** ..... 15

**SECTION 5 — CALENDAR & BOOKING AUTOMATIONS** ..... 16

Contact & Portfolio Links ..... 17

## EXECUTIVE SUMMARY

AscendyX specializes in building end-to-end GoHighLevel systems that centralize lead capture, CRM management, automation, and booking workflows into a single, reliable platform.

Our focus is on designing automation-first architectures that reduce manual workload, improve response speed, and create consistent conversion flows. Every system is built using native GoHighLevel capabilities, ensuring stability, scalability, and ease of long-term maintenance.

This portfolio highlights our hands-on experience designing, configuring, and deploying GoHighLevel systems for real-world use.

## CORE GOHIGHLEVEL EXPERTISE

- GoHighLevel Funnel and Website Builder
- CRM Setup and Pipeline Architecture
- Workflow and Automation Design
- SMS and Email Automation
- Calendar and Booking Systems
- HTML/CSS Email Templates within GHL
- Snapshot Creation and Reusable System Builds
- Client Onboarding and System Walkthroughs

# SECTION 1
# AUTOMATIONS AND WORKFLOWS

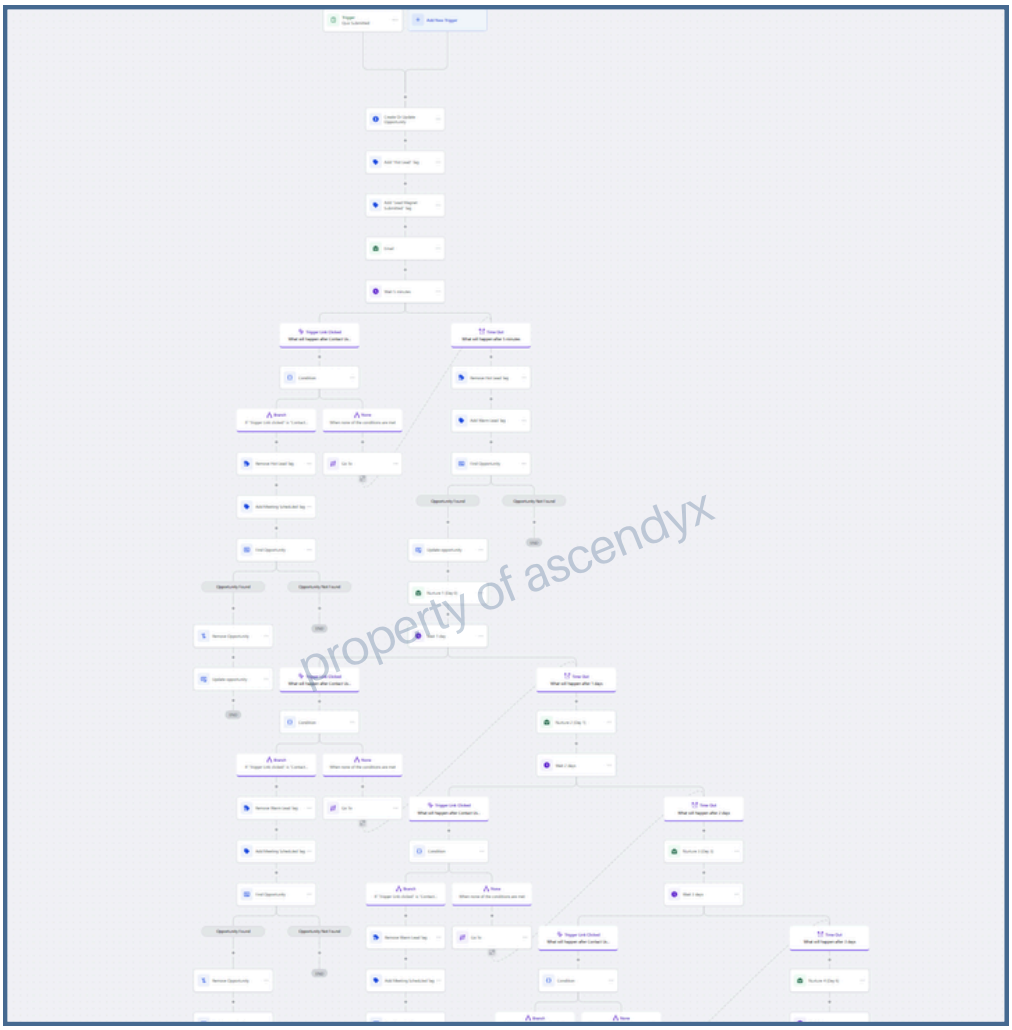
## AscendyX Lead Magnet — Automation Scorecard

This lead magnet automation is a fully optimized AscendyX Smart Investor Funnel, built in GoHighLevel to capture, score, and nurture leads hands-free. Once a user completes the scorecard, the system automatically segments them by result type, assigns tags, and launches a personalized email sequence aligned with their growth profile. Each pathway includes timed follow-ups, opportunity updates, and reactivation triggers ensuring consistent engagement, precise CRM tracking, and a seamless conversion flow from quiz to booked call.



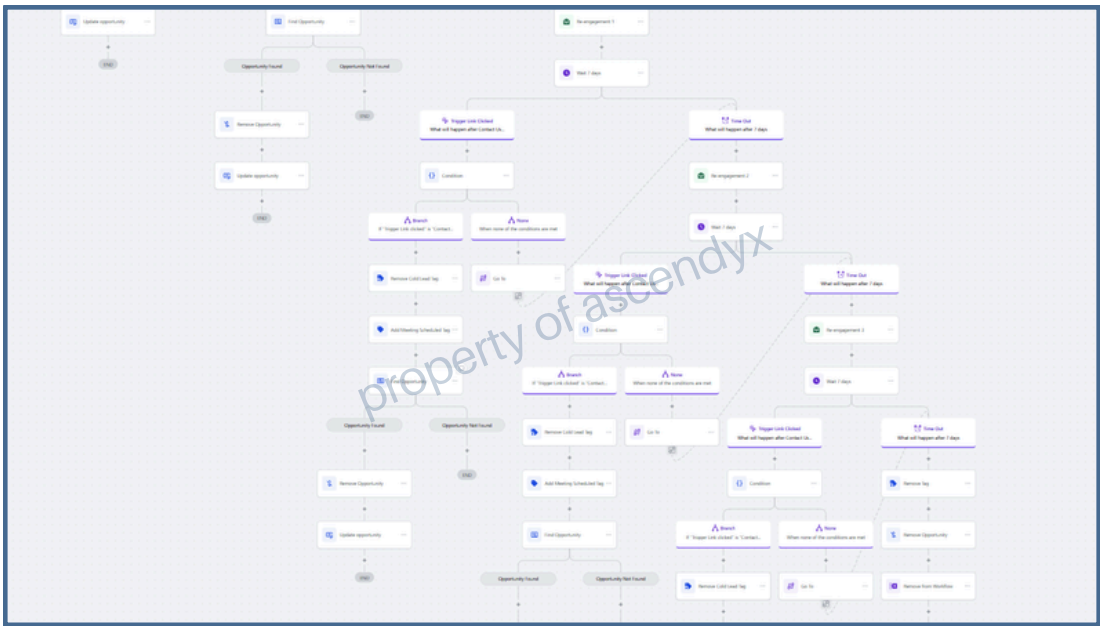
## AscendyX Lead Magnet — Quiz
### *(Scale Smarter: Diagnose Your Brand's Growth Blind Spot)*

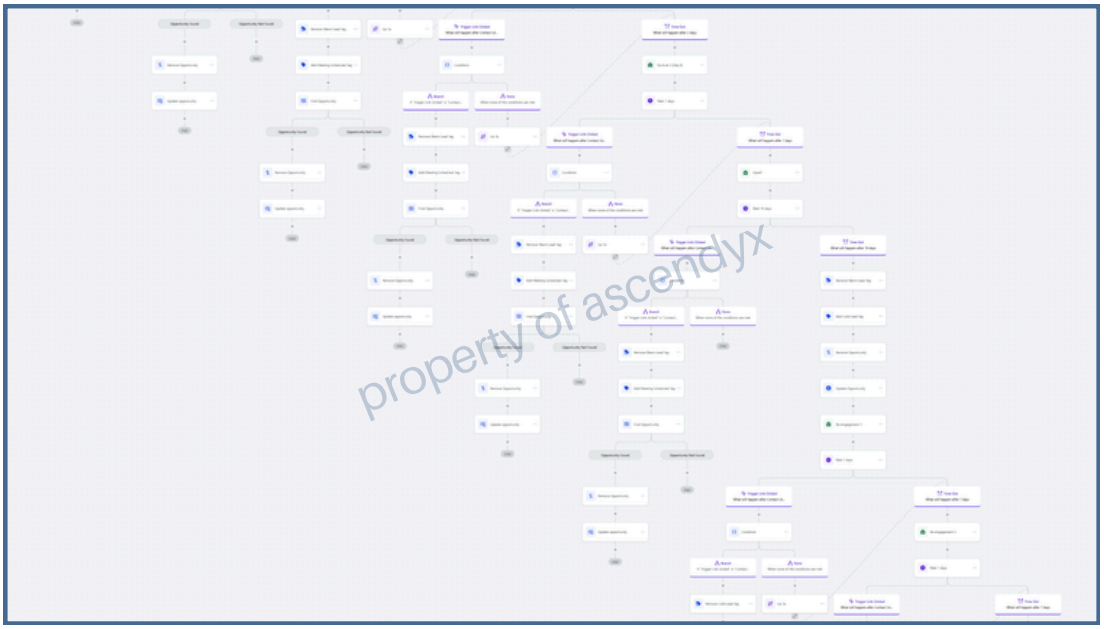
This 5-week AscendyX Quiz-to-Client Funnel is a long-form lead magnet system designed to nurture prospects through every stage of the decision journey. After completing the quiz, leads are segmented by their growth profile and enrolled in a tailored email series that delivers strategic insights, case studies, and soft CTAs over five weeks. Each phase builds familiarity and trust—transitioning from awareness to conversion, before entering an automated re-engagement loop that revives cold leads and drives them back into the sales pipeline with precision and consistency.



## Continuation of the Quiz Automation

Expanded branches handle re-engagement, follow-ups, and pipeline updates.



## Client Automation Case Study
### *(Cold LinkedIn Outreach System)*

This automation system was built in GoHighLevel to manage Yum Street's cold LinkedIn outreach. Once a prospect connects on LinkedIn, the lead is added to the CRM and automatically enrolled into a structured nurture and qualification workflow.

The automation ensures that every connection moves through a defined process, from initial outreach to engagement and conversion. Instead of relying on manual follow-ups, the system manages communication automatically through scheduled email sequences, pipeline updates, and conditional automation logic.

By structuring the outreach process inside the CRM, Yum Street gains full visibility of each lead's status while maintaining consistent communication with prospects.

The system tracks engagement, updates pipeline stages, and triggers follow-up sequences to ensure every lead progresses through a defined lifecycle from connection to conversion.

---

**System Features**

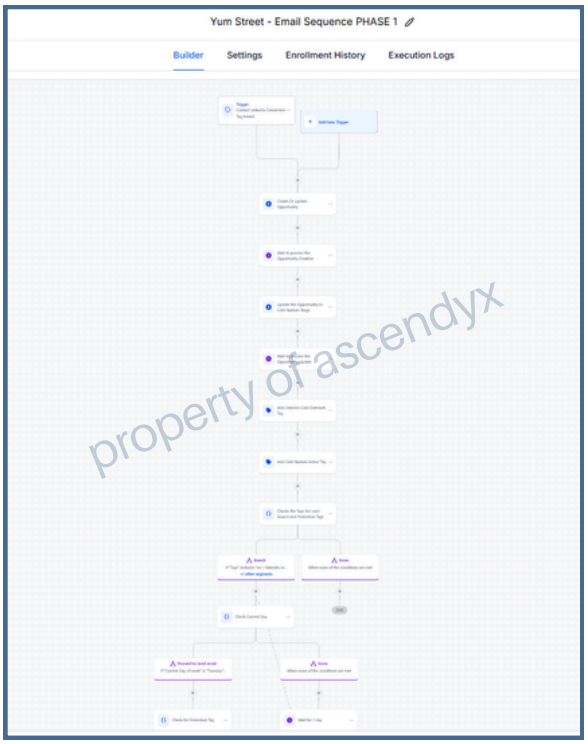
- Automated LinkedIn lead entry into CRM
- Multi-stage pipeline tracking and opportunity creation
- Structured email nurture sequences triggered by automation
- Lead intent tagging and segmentation based on engagement
- Conditional workflow branches for qualification outcomes
- Internal task creation for manual follow-ups when required
- 30-day and 6-month re-engagement campaigns for inactive leads

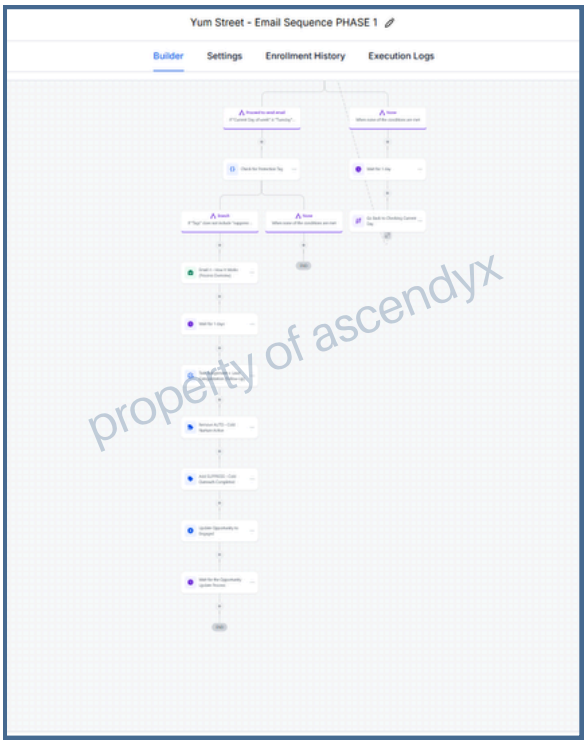
These components work together to transform cold outreach into a structured lead management system, allowing Yum Street to track prospects, maintain follow-up consistency, and convert qualified leads into booked appointments or quote requests.

## Phase 1 — Lead Entry & Initial Nurture Automation

This workflow begins when a LinkedIn prospect connects and is tagged inside the CRM. The tag acts as the trigger that activates the automation and creates a new opportunity in the pipeline.

Once triggered, the system automatically enrolls the lead into the initial nurture sequence, sending structured follow-up emails over a defined schedule. During this process, the automation monitors engagement and applies relevant tags to track lead activity.



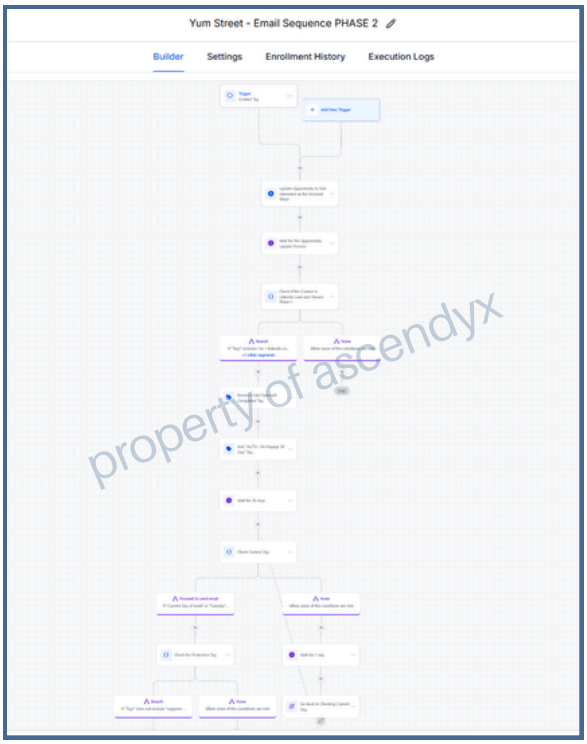

At the end of the workflow, the system updates the contact's automation status and prepares the next step in the lead lifecycle. Depending on the outcome, the lead may move to qualification, receive additional follow-up, or transition into another automation path.

## Phase 2 — Continued Nurture & Engagement Automation

This workflow manages the second stage of the outreach process, continuing engagement with prospects who did not convert during the initial outreach phase.

Once triggered, the system sends a structured sequence of follow-up emails designed to maintain engagement and provide additional information about Yum Street's services. Each message is scheduled with timed delays to ensure consistent but non-intrusive follow-up.




The automation tracks engagement signals such as replies, link clicks, or other interactions. Based on these signals, the system can update lead tags, adjust pipeline stages, or route the contact into additional workflows.

At the end of the sequence, leads are either moved forward in the pipeline, transitioned to another automation path, or prepared for future re-engagement campaigns.

## Phase 3 — Additional Information Nurture Automation

This workflow is triggered when a prospect expresses interest but requests additional details before proceeding.

The automation enrolls the lead into a short email sequence that provides further information about Yum Street's services and addresses common questions prospects may have during the decision process.







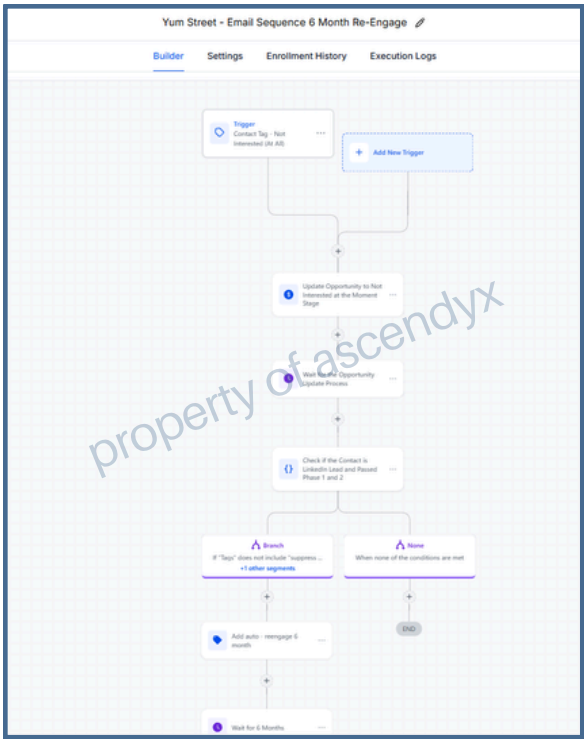
Each message is delivered with scheduled delays to maintain engagement while giving the prospect time to review the information. Engagement signals such as replies or clicks are tracked to help identify leads that are moving closer to conversion.

At the end of the sequence, the system creates an internal follow-up task, allowing the team to reach out personally if the lead remains interested.

## Phase 4 — Long-Term Re-Engagement Automation

This workflow manages long-term follow-ups for prospects who were not ready to proceed during the initial outreach process.

When a lead is marked as not interested at the moment, the system places the contact into a delayed re-engagement sequence designed to reconnect after six months.







After the waiting period, the automation sends a follow-up email to reintroduce Yum Street's services and check if the prospect's needs have changed.

This approach ensures that previously inactive leads are periodically reactivated without requiring manual tracking or follow-up.

# SECTION 2
# FUNNEL AND LANDING PAGE SYSTEMS

## Automation Scorecard — Landing Page

All funnels and landing pages are built within GoHighLevel and function as entry points into automation systems.

Each funnel is connected to:

- CRM pipelines
- Workflow triggers
- Tagging and segmentation logic
- Calendar and booking automation

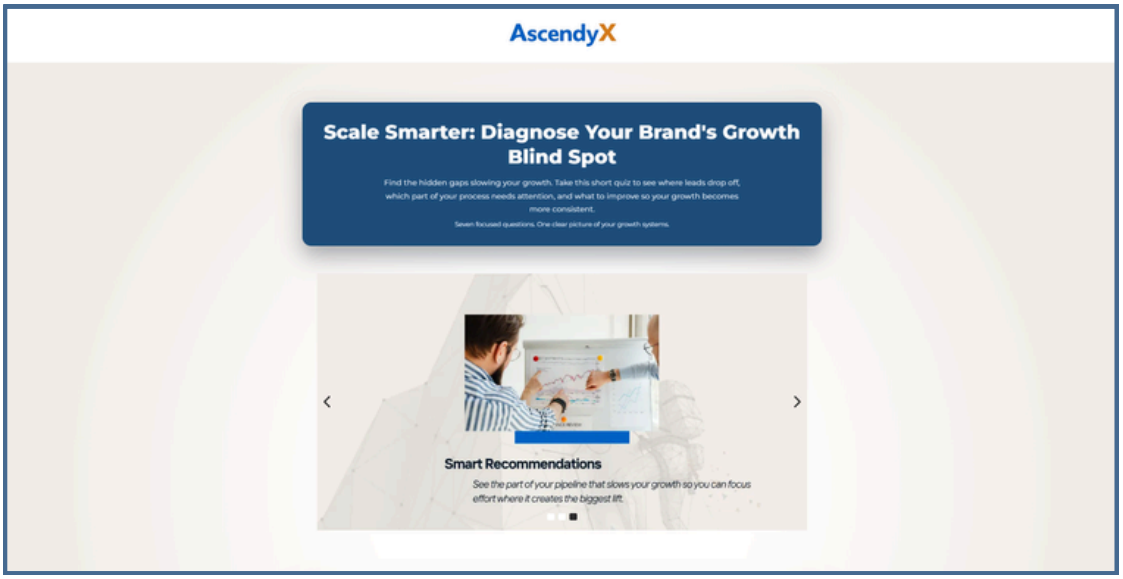


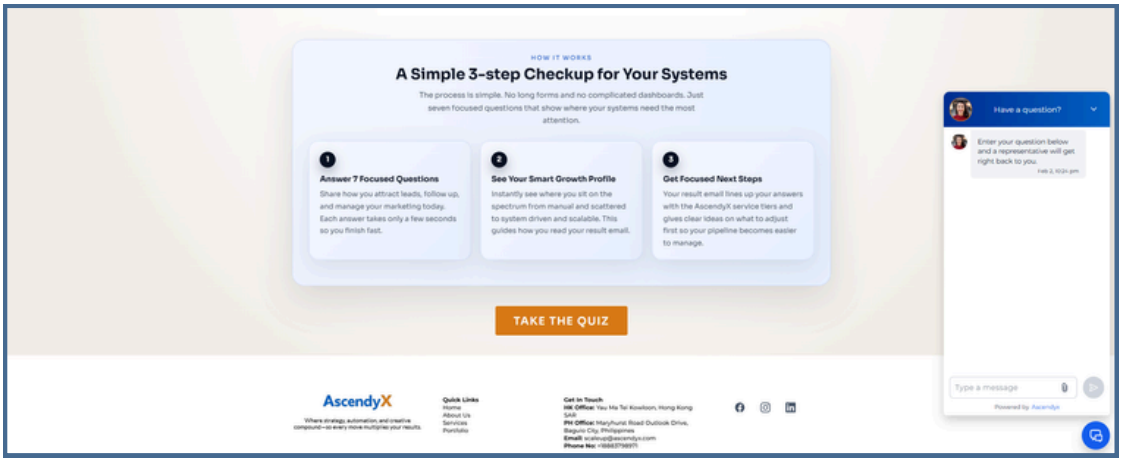



## Quiz (Scale Smarter) — Landing Page

This landing page is built in GoHighLevel and serves as the main entry point for the Scale Smarter quiz funnel. It is designed to drive quiz completion while capturing and routing leads directly into the CRM.

Quiz submissions automatically apply tags and custom fields, trigger segmented email workflows, and create or update opportunities in the pipeline. The page also includes a native GoHighLevel live chat widget, allowing visitors to ask questions in real time or asynchronously, with all conversations logged inside the CRM.



# SECTION 3
# EMAIL AUTOMATION & HTML/CSS TEMPLATES

This section showcases email automation workflows built inside GoHighLevel that are triggered by real-time events and system conditions.

The Messenger Entry Funnel workflow activates when a prospect interacts with a trigger word on a social post. The system automatically initiates a conversation, captures the contact in the CRM, applies tags, and routes the lead into follow-up workflows that include email and SMS where appropriate.

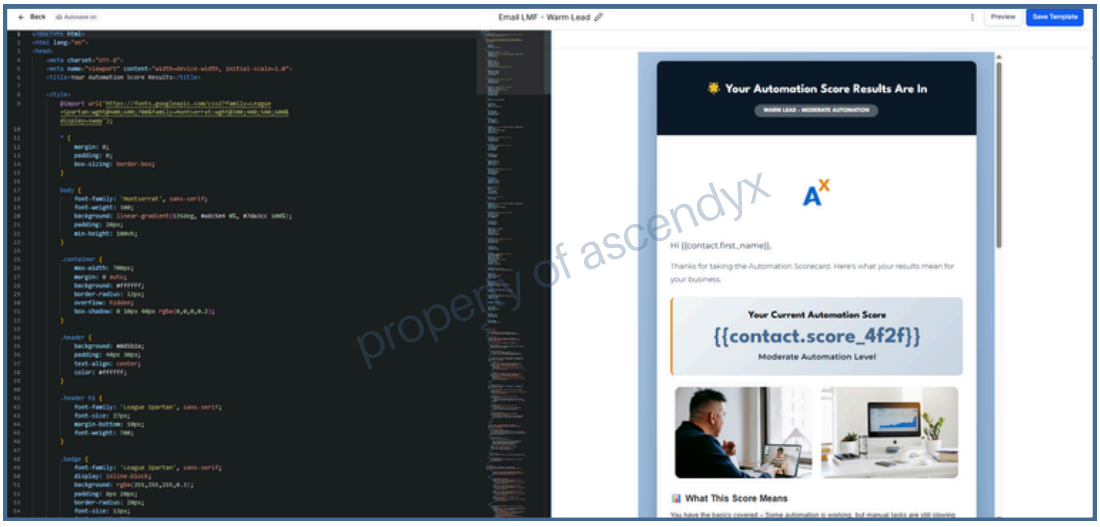
The Hard Bounce Handling workflow monitors email delivery status and automatically removes or reclassifies contacts when a hard bounce is detected. This prevents repeated delivery attempts, protects sender reputation, and keeps contact lists clean.

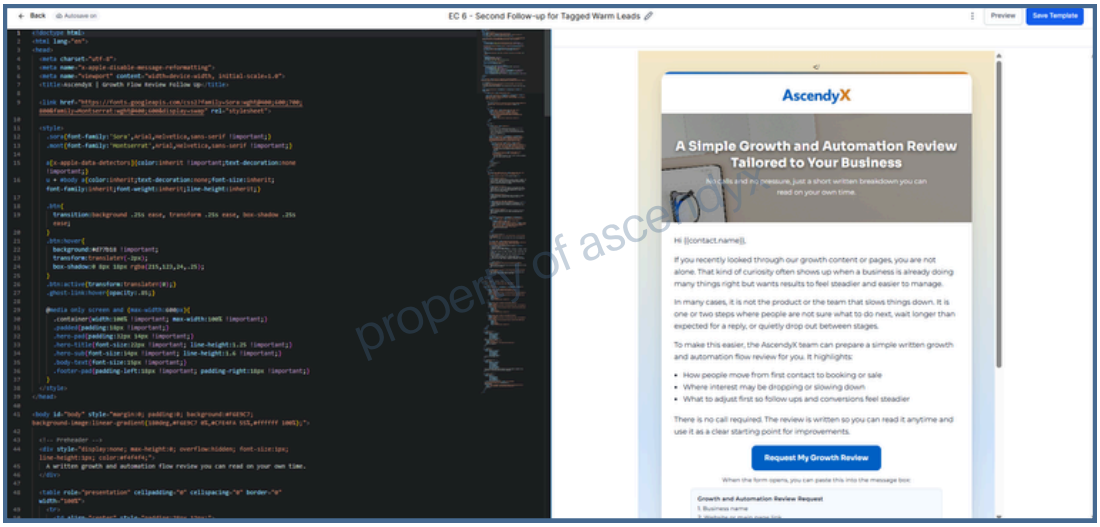



*Messenger Entry Funnel and Hard Bounce Handling Workflow*

These HTML/CSS email templates are custom-built for use inside GoHighLevel and deployed exclusively through automated workflows.

Templates are structured to ensure consistent formatting, responsiveness, and compatibility across major email clients.



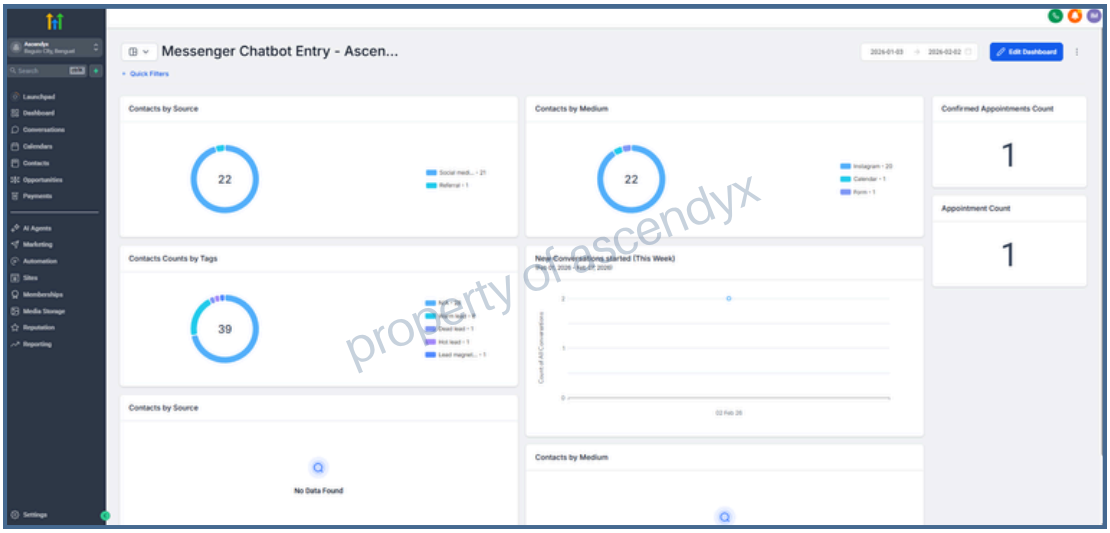



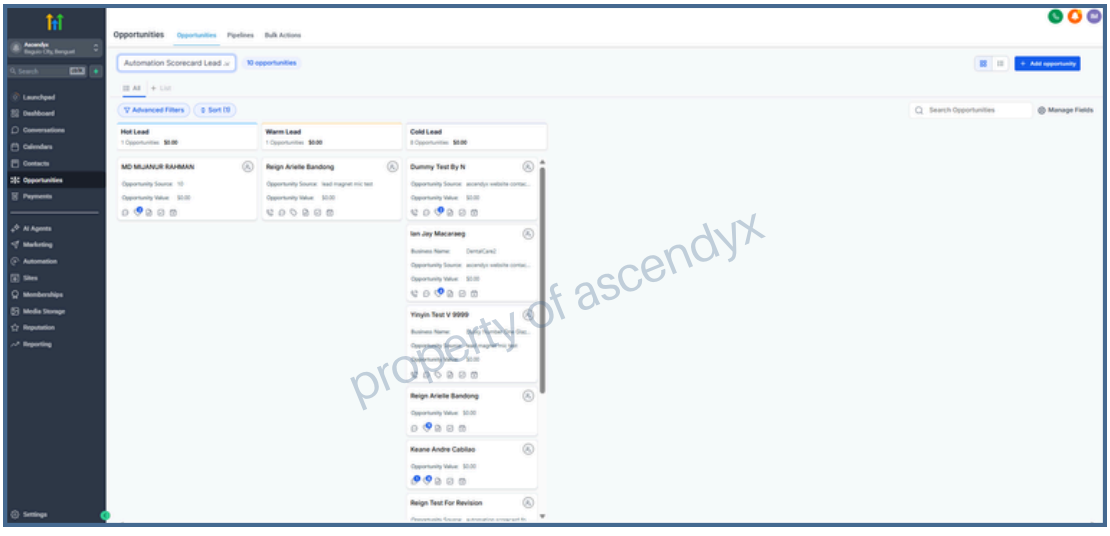

***HTML/CSS Email Templates integrated in the Quiz Lead Magnet and Cold Outreach***

# SECTION 4
## CRM & PIPELINE ARCHITECTURE

This section highlights CRM structure and opportunity management built within GoHighLevel.

Leads are automatically converted into opportunities, routed through custom pipeline stages, and updated based on workflow, engagement, and booking activity. This ensures full visibility from initial lead capture through conversion without manual tracking.

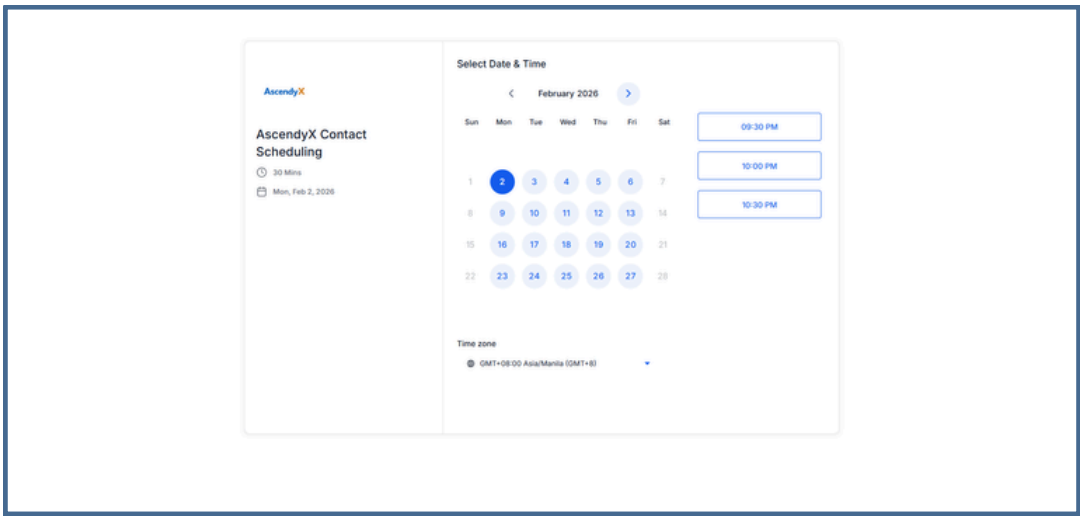


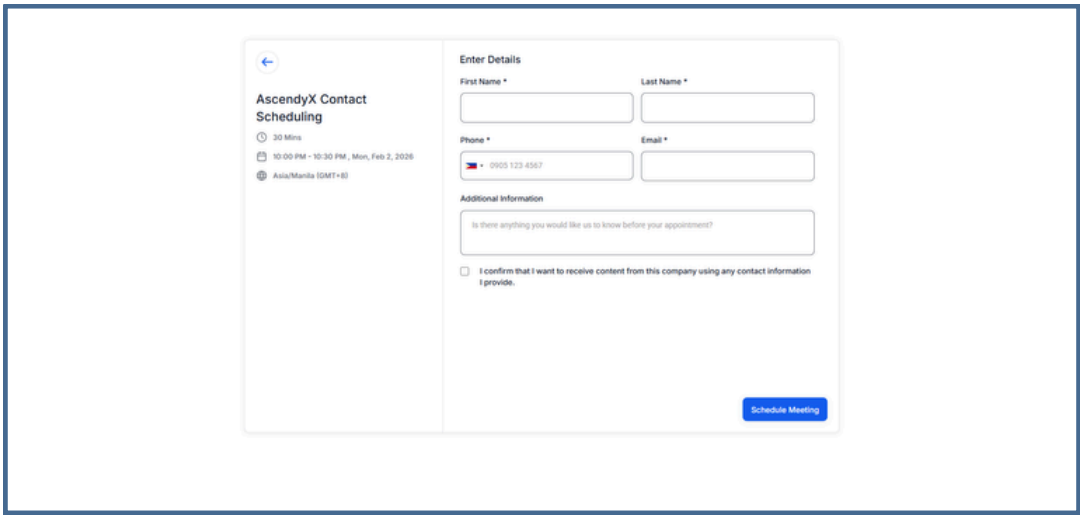



# SECTION 5
# CALENDAR & BOOKING AUTOMATIONS

GoHighLevel calendars are configured with automation that manages the full appointment lifecycle.

Booking events trigger confirmations, reminders, follow-ups, and pipeline updates. No-show and missed-booking workflows ensure leads are not dropped and are automatically re-engaged where appropriate.



# Launch Bold. Grow Smart. Experience Growth to the Power of X

**Website**
www.ascendyx.com

**Email**
info.ascendyx@gmail.com
scaleup@ascendyx.com

**Want to see our work? Visit our social medias**
Facebook | LinkedIn | Instagram

**Portfolio**
View our work