



Fully Automating a Real Estate Webinar Funnel with GoHighLevel & Obvio: A Case Study

Client Background & Problem

The client was a real estate professional focused on converting webinar attendees into high-value clients. They regularly hosted educational webinars on real estate investing and lead generation, aiming to turn those webinar leads into actual business. However, their **process was largely manual and cumbersome**. Every webinar required manually registering attendees, sending confirmation emails, scheduling reminder messages, segmenting VIP purchasers versus free attendees, and updating information across multiple platforms. This manual workflow consumed a lot of time and was **prone to human error** – e.g. missing an email, forgetting to tag a VIP, or duplicating data entry across systems. In short, the client’s team was spending too much effort on administrative tasks rather than focusing on delivering quality content and building relationships.

The **main problem** was the lack of automation and integration. The client used GoHighLevel (GHL) for landing pages and CRM, Obvio for hosting the webinar sessions, and Twilio (via GHL) for SMS – but these weren’t talking to each other automatically. Onboarding each registrant, ensuring they received the correct webinar access link, keeping track of VIP vs free status, and sending timely reminders had become **labor-intensive and error-prone**. The client needed a way to tie all these pieces together so that no interested lead “fell through the cracks” due to a missed step or a manual mistake.

What the Client Needed

From our initial discussions, it was clear the client needed a comprehensive automation solution to streamline their webinar funnel. In particular, they wanted to:

- **Automate the webinar sign-up flow:** When someone registers via a GHL form, the system should automatically handle webinar access – sending confirmation emails, delivering the webinar **join link**, and logging the attendee into the webinar platform (Obvio) without manual input.
- **Segment the attendee experience (Free vs. VIP):** The client offered a VIP upgrade that included bonus content (such as a Q&A session or extra materials). The automation needed to differentiate **VIP attendees** from **Free attendees**, providing each segment with an appropriate experience (for example, VIPs might get access to a special session or additional reminders).
- **Seamlessly integrate multiple platforms:** GoHighLevel forms, Obvio webinar “rooms,” and SMS/email workflows all had to work in unison. The client wanted data to sync across these systems in real-time – meaning if someone signs up or upgrades to VIP, every system (email marketing, webinar platform, SMS reminders) immediately knows and adjusts the communication accordingly. In summary, **less manual data entry**, more real-time updates, and a single cohesive funnel.

My Understanding of the Project

When I scoped the project, I understood the client's core desire was a **hands-free webinar system** – one that would require minimal manual intervention once set up. The vision was that a lead could register for the webinar and *everything else just happens*: the lead gets their confirmation and reminders, they show up to the webinar (with the correct access level), and the client can focus on presenting and following up with interested prospects.

To achieve this, a few insights became clear. First, **proper tagging and segmentation** would be critical. We needed a way to mark contacts as “Free” or “VIP” right at registration, so that all downstream communications could branch appropriately. Second, we recognized the importance of **smart link generation** – each registrant, especially VIPs, would need a unique join link to the webinar (from Obvio). Capturing that link and injecting it into emails and texts automatically would save the client from manually doing so for every attendee. Finally, **timing of reminders** was crucial. The system had to send reminders at specific intervals (one week before, three days before, day-of, etc.), but also adjust if someone registered late. My takeaway was that the solution needed not only to automate tasks, but to do so intelligently – accounting for different user types and signup times so that every attendee gets a smooth experience without manual oversight.

Creative Strategy & Approach

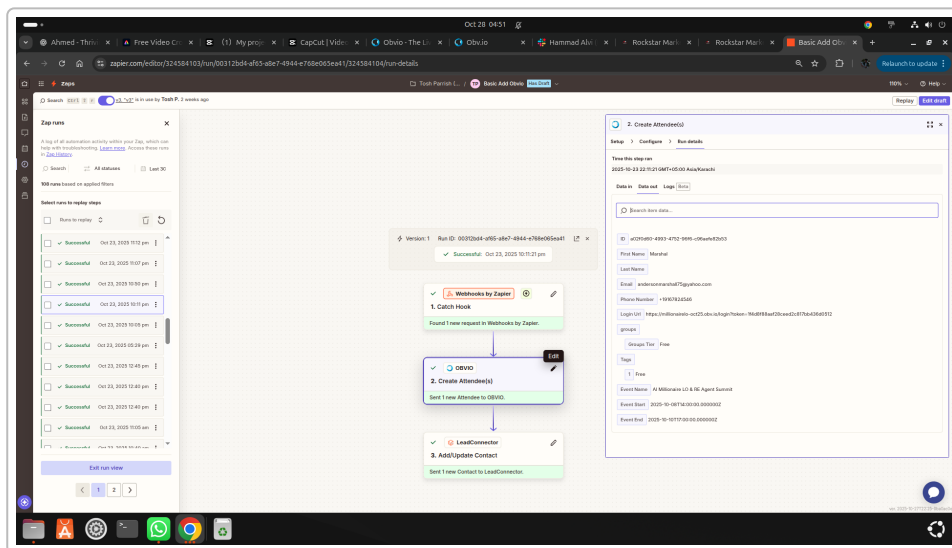
To tackle the problem, I formulated a strategy that connected all the moving parts (GHL, Obvio, Zapier, Twilio) into one cohesive workflow. The approach was centered on using Zapier as the “glue” between GoHighLevel and Obvio, with Twilio integrated through GHL for messaging. At a high level, the plan unfolded in several steps:

- 1. Sync Registrations to Obvio:** We built a GoHighLevel form for webinar sign-ups. Whenever someone registered (filling in their name, email, phone, and whether they opted for the VIP upgrade), GHL would trigger a webhook. This webhook sent the attendee's data to Zapier immediately upon submission. Zapier, in turn, called the **Obvio API to create a new attendee** in the webinar platform. This ensured that every sign-up on the landing page was instantly registered in Obvio as an event attendee – no manual importing of participant lists needed.
- 2. Tag and Segment VIP Attendees:** Within GHL, we set up logic to tag contacts based on their registration type. If the person registered as a VIP (for example, by using a VIP signup link or purchasing a VIP ticket), they were automatically assigned a “VIP” tag in GHL; others were tagged as “Free Attendee.” This tag not only lived in GHL for our reference, but was also passed through to Obvio (as a field indicating their **Tier** or group). That way, both systems knew who was a VIP. We created two **smart webinar rooms** in Obvio – one for free attendees and another for VIPs. The Obvio platform allowed us to have separate “areas” or sessions within the event, and by leveraging the attendee Tier information, we could route VIP members to the exclusive VIP room (for example, a special Q&A session after the main webinar).
- 3. Capture Unique Webinar Links:** Obvio generates a unique login URL (access link) for each attendee upon registration. A key part of our approach was to **retrieve this link** via the API and store it back in GoHighLevel. We added a custom field in GHL (e.g. “Webinar Access Link”) for this purpose. When Zapier created the attendee in Obvio, Obvio's response included the new attendee's unique **login URL token**. Zapier extracted that and then updated the GHL contact's record, inserting the token into the custom field. This way, the client could always find an attendee's personal join link in their CRM profile, and our automated emails and SMS could use merge fields to include the correct link for each person.

- Email and SMS Workflow Automation:** With contacts now in GHL and tagged (and their webinar link on file), we designed **automated workflows** for all communications. We wrote one set of emails/SMS for Free attendees and another for VIPs. Both groups would receive a registration confirmation immediately, plus a series of timed reminders (e.g., a “7 days to go” email, a “3 days to go” SMS, a day-before reminder, and so on). These communications were built in GHL’s campaign/workflow builder, using conditions to branch based on the VIP/Free tag and using the custom webinar link field for personalization. Twilio was configured in GHL to send out the SMS reminders under the client’s business number. Essentially, once someone signed up, the correct sequence of messages would queue up without anyone having to push a button.
- Dynamic Timing & Edge Case Handling:** We incorporated **custom logic** to handle edge cases, especially regarding timing. If someone registered very close to the webinar date (say, a day before), the workflow would recognize that and skip any irrelevant earlier reminders (there’s no point sending a “7-day reminder” to someone who registered yesterday!). We achieved this by setting conditional checks in the GHL workflow – for instance, a condition like “if current date is more than 7 days before event, then schedule the 7-day-out reminder; otherwise, skip it.” Similarly, late registrants might get a “welcome” or immediate reminder upon sign-up, ensuring they still received crucial info despite missing earlier scheduled communications. This dynamic scheduling ensured **no attendee received confusing or redundant messages** due to a late sign-up.

By following this strategy, every component had a defined role: GHL captured and tagged the lead, Zapier moved the data and orchestrated the external systems, Obvio hosted the attendee in the correct webinar room, and Twilio (via GHL) handled the messaging. It was a blueprint that promised zero manual data entry after the initial setup – exactly what the client was looking for.

Solution Development



Using Zapier to connect GoHighLevel and Obvio. In the development phase, I implemented the above strategy step by step. I created a **workflow in GoHighLevel** that triggers on form submission (the webinar signup form). This workflow’s first action was a webhook that posts the registrant’s details to Zapier. On the Zapier side, I built a multi-step Zap to handle the integration: **(1) Catch Hook** (receive the data from GHL), **(2) Create Attendee(s)** in Obvio, and **(3) Add/Update Contact** in GHL. The screenshot above shows a Zap run in action – it caught a new registration, sent the attendee info to Obvio (notice the “Sent 1 new Attendee to OBVIO” confirmation), and then updated the contact in GHL (labeled as “LeadConnector” which is GoHighLevel’s API) with the returned data. The **data-out** panel on the right

highlights some key fields: the attendee's email and name, their Tier ("Free" in this example), and the **Login URL** that Obvio generated for them. That login URL was parsed and saved into a custom field on the GHL contact. By structuring the automation this way, we ensured every new registrant seamlessly flowed into both systems with all relevant info (including their access link and VIP status).

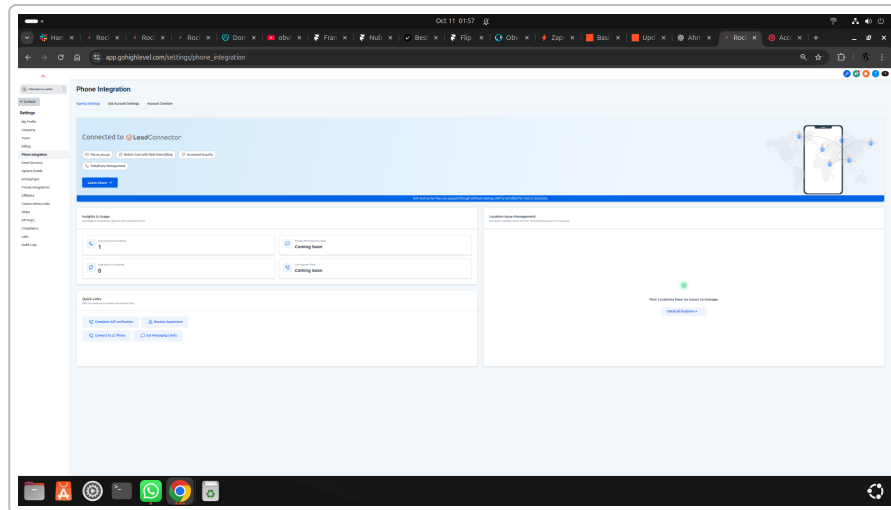
I took care to configure the Obvio API call correctly – mapping fields like first name, last name, email, and phone into the attendee creation endpoint. We also passed a parameter for the attendee's "**Tier**" (**Free or VIP**), so Obvio would mark their profile accordingly. On Obvio's side, I set up two separate webinar rooms within the same event: one designated for **Free Session** and another for **VIP Session**. Obvio has a feature called "Zoom Areas" (virtual breakout rooms), which I utilized to create these two session areas. Free attendees were associated with the main session, whereas VIP attendees were flagged so that after the main presentation they could be invited into the VIP-only room for extra Q&A time. We also leveraged **Obvio's conditional content tools** – for instance, certain widgets or downloads in the webinar room could be made visible only to VIP attendees. This way, the VIP customers would see exclusive offers or resources during the webinar that free users would not, enhancing their experience.

With the attendee creation and data syncing working, I then built the **communication workflows in GoHighLevel**. For emails, we created templates for confirmation and reminders, embedding the attendee's name and their unique webinar join link (from the custom field). For SMS, we wrote concise reminder texts that also included the join link short code (GHL can shorten links in SMS). These workflows were segmented by using simple **if/else logic on the contact's tag**: if "VIP" tag is present, send the VIP version of messages; if not, send the standard version. The VIP emails, for example, mentioned the exclusive Q&A session and had the VIP room link, whereas the free emails focused on the main webinar details. I scheduled the reminders relative to the event date using GHL's workflow timer features. For example, the "7-day reminder" email was scheduled for 7 days before the event at 10:00 AM, and similarly for 3 days before, 1 day before, etc. GHL's workflow allowed me to put checks like "Wait until 7 days before Event Date" – but I added safeguards so that if the contact entered the flow after that time, those steps would simply be skipped. This was tested by simulating late sign-ups and verifying they didn't get backlog emails.

Overall, the development process was iterative: build the integration, test end-to-end with a dummy signup, adjust, and repeat. By the end of development, we had a robust system where the **only manual step was the client launching the webinar itself** – everything else, from registration to follow-up, was fully automated.

Roadblocks & Challenges

Even with a solid plan, there were several challenges and roadblocks during implementation. Some of the notable issues we encountered included:



- **Twilio SMS Deliverability:** Initially, none of the automated SMS reminders were going out. We discovered that the Twilio integration (via GoHighLevel's LeadConnector) was connected, but **A2P 10DLC registration** was not completed. A2P registration is a compliance requirement for business SMS in the US, and without it, carrier networks were filtering out the messages. In the GHL phone integration settings (shown above), a prompt to “Complete A2P verification” indicated the pending status. Essentially, our texts were blocked until the business registration was approved. This was a critical challenge because SMS reminders were a key part of the workflow's effectiveness.

- **Obvio API Hiccups:** When we first tried creating attendees in Obvio through Zapier, we hit some errors. Some API calls weren't succeeding because of formatting or missing data – for example, Obvio required certain fields (like an event ID, or specific group names for VIP) to be exactly right. There was a learning curve in understanding Obvio's API documentation and making sure our payload matched what Obvio expected. Until we fine-tuned that, a few test sign-ups didn't appear in Obvio, which was worrisome.
- **Webhook Sync Issues:** We also dealt with occasional synchronization issues between GoHighLevel and Zapier. In a couple of cases, the GHL webhook didn't seem to trigger or Zapier didn't catch it fast enough, resulting in a contact not being created in Obvio or the custom field not updating. These timing issues could have been due to minor misconfigurations or internet latency. It required careful debugging to ensure every webhook payload was reliably received and processed.
- **Lack of Timestamped Logs in Obvio:** Obvio's admin interface did not provide detailed logs or timestamps for actions like “attendee created via API” or “email sent to attendee.” This made troubleshooting tricky – if an attendee didn't get registered or an email didn't send, it was hard to tell *when* or *if* a specific automation ran on Obvio's side. We often had to cross-reference Zapier's timestamps and GHL's activity logs to piece together a timeline. The absence of clear logs in Obvio meant that debugging issues (like duplicate entries or missed triggers) took extra time and care.

Each of these challenges taught us something and forced a solution or workaround to keep the project on track. Instead of giving up on features, we addressed them one by one, as discussed next.

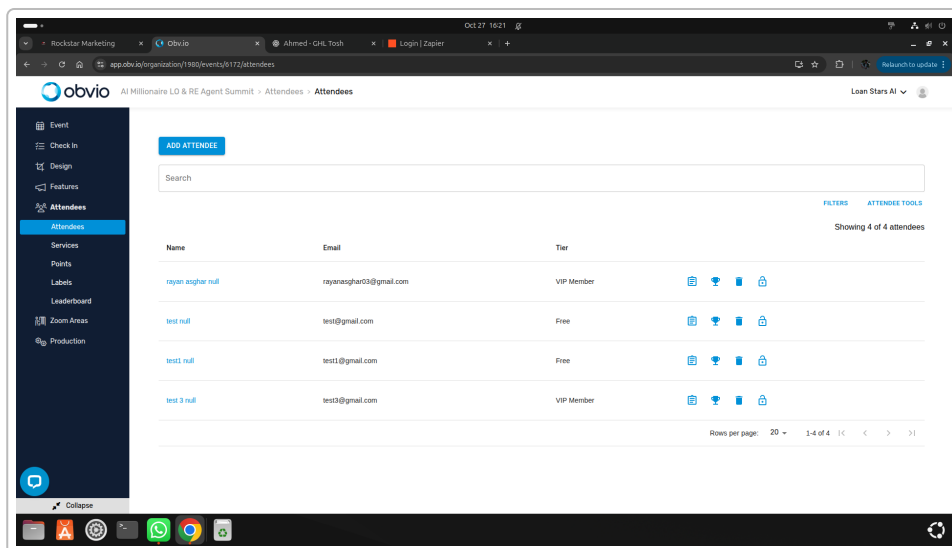
Creative Workarounds & Problem-Solving

Overcoming the above roadblocks required a combination of technical tweaks, testing, and clever use of platform features. Here are the key solutions and workarounds we implemented:

- **Thorough API Testing:** To solve the Obvio attendee creation errors, I performed manual tests of the API payloads. Using tools like Zapier's built-in **Webhook tester** and dummy data, I sent test requests to the Obvio endpoint to see what responses came back. By reviewing error messages and adjusting the JSON fields (for example, ensuring the event identifier and tier/group fields were correct), I eventually got consistent "success" responses. This manual payload testing was crucial – it allowed us to confidently create attendees in Obvio with all required info. Once the Zap was reliably creating attendees (no more missing registrants), we knew the core integration was solid.
- **Custom Field for Webinar Link:** Storing the Obvio login URL in a GoHighLevel custom field turned out to be a simple but powerful workaround. Initially, we considered sending the link directly from Zapier via email, but that would bypass GHL and make it hard to track communications. By injecting the link into the GHL contact record, we could use GHL's own email and SMS templating to include that link dynamically. This meant the client could later modify the email copy or SMS content in GHL without touching Zapier, and the link would always merge in correctly. It also gave the sales team quick access to each person's webinar link in case they needed to resend it manually or follow up – all within the CRM.
- **Smart Use of Tags & Conditional Logic:** To handle segmentation and timing in one unified workflow, I leaned heavily on **conditional logic in GoHighLevel**. For example, a single automation workflow contained branches like "If VIP tag is present -> send VIP emails; Else -> send Free emails." Similarly, conditions checked the current date against the event date to decide whether to queue certain reminders. This avoided the need to maintain multiple separate workflows for different cases. It was a bit complex to set up (essentially mapping out all possible paths an attendee could take), but once in place, it functioned elegantly. Late registrant? They skip ahead and only get what's relevant. VIP member? They get added communications about their perks. Using tags and conditions in this strategic way solved what could have been a messy problem of juggling multiple parallel automations.
- **Twilio Configuration Fixes:** For the Twilio SMS issue, the fix was twofold. First, we switched the integration from any test credentials to the **live Twilio (LeadConnector) setup** on the client's GHL account. This ensured that messages were actually attempting to send through the verified business number. Second, we went through the **A2P 10DLC registration** process: submitting the necessary business information and campaign use-case to get carrier approval. Once this registration was completed (and the status in the Phone Integration settings showed as verified), the SMS deliverability problems disappeared. We ran new tests and saw that reminders were reaching our test phone numbers reliably. Essentially, by using the proper production settings and complying with carrier regulations, we overcame the messaging roadblock and got the SMS channel working as intended.

Each workaround addressed a specific challenge, and together they ensured the entire automation ran smoothly. These problem-solving steps not only fixed immediate issues but also made the workflow more robust for future use (for instance, if the client changes the webinar details or scales up the number of events, the system is now resilient enough to handle it).

Outcome & Final Deliverables



Attendees in Obvio are now automatically categorized by tier (Free vs VIP). In the end, we delivered a fully automated webinar funnel that met all the client's needs. **The integration between GoHighLevel, Zapier, Obvio, and Twilio is now seamless.** The moment someone signs up on the client's webinar landing page, they are automatically registered in the Obvio webinar event (with the correct tier assignment) and get an email confirmation with their unique join link. Both the Free and VIP attendees are handled appropriately: the system knows who is who, and every message or access link they receive is tailored accordingly. The Obvio platform, as shown above, clearly lists each registrant and labels their Tier as "VIP Member" or "Free" – a confirmation that our segmentation logic is working perfectly behind the scenes. The client no longer has to cross-check lists or manually invite people to the webinar; it's all taken care of by the automation.

For the client, this outcome means a **dramatic reduction in manual workload**. They now have:

- **An automated registration and onboarding workflow:** All attendee data flows from GHL to Obvio instantly, and each contact's CRM record is populated with the webinar access info. The days of exporting CSV files or copying webinar links one by one are gone.
- **Two synchronized webinar rooms (Free and VIP):** Within Obvio, the event is configured to accommodate both regular attendees and VIPs. Free attendees join the main webinar session, while VIP attendees automatically have access to the VIP-only session (for example, a special Q&A or networking segment after the main presentation). The hand-off between these sessions is managed by Obvio with the data we pass it – so if you're a VIP, the platform knows to allow you into the VIP room.
- **Tailored email/SMS sequences for each segment:** The communications funnel adjusts based on attendee type and sign-up timing. VIP customers receive all the information they need for their premium experience (and perhaps feel "valued" by the more personalized touch), whereas Free attendees get nurturing content that keeps them engaged (and possibly encourages them to consider VIP or other services in the future). Every attendee, regardless of type, gets timely reminders as the webinar approaches, improving show-up rates. Importantly, those reminders go out through both email and text message reliably now, expanding the chances of reaching people in time.
- **Dynamic reminder logic:** The reminder schedule is fully dynamic. If someone registers far in advance, they'll receive the full sequence of nurture emails and countdown reminders. If they register last-minute, the system adapts and might send a "welcome, here's your link for

tomorrow!" message so they're caught up. This means no one is ever out of the loop or confused by irrelevant emails. The client can run webinars weekly or monthly without ever tweaking the schedule – the workflow inherently adjusts to each event's date and each sign-up's timing.

After thorough testing and a successful dry run with a small group, the **final deliverables** handed off to the client included all the configured workflows (in GHL and Zapier), documentation on how the system works, and training on how to adjust basic settings (like updating the webinar dates or email content for future webinars). The client was extremely pleased to see that they could now scale up their webinar marketing – even running multiple campaigns – without worrying about the operational bottlenecks. The automation ensured that **every lead was immediately engaged and no follow-up task was overlooked.**

Key Learnings & Reflections

This project was a great example of how combining the right SaaS tools can replace manual drudgery with smart automation. One key learning was the **power of stacking GoHighLevel, Zapier, and Obvio together** to create a lightweight yet powerful CRM and event automation system. Rather than custom-coding a solution from scratch, we achieved a sophisticated workflow by configuring these platforms to talk to each other. It underscored that small businesses can get enterprise-like automation with the tools that are already available to them – if those tools are properly connected.

Another takeaway was the **importance of meticulous field mapping and token handling** when integrating multiple systems. In this case, ensuring the Obvio login token was correctly captured and inserted into GHL (and then into emails) was a linchpin of the whole project. A tiny mistake in how a field is mapped or a token is stored could break the chain and cause confusion for users. I learned to double-check every data handoff: first name, last name, email, tags, custom fields – everything had to line up perfectly so that the automation would run without a hitch.

Finally, this project reinforced the value of **human review and testing in automated workflows.** Even with all the clever logic and conditions we set up, we discovered edge cases and issues only through thorough testing and observation (for example, noticing an SMS didn't send because of Twilio A2P, or an attendee not being created due to an API quirk). Automation is not "set and forget" until you've verified it under real-world conditions. Now that it's running, the client can mostly forget about it – but getting to that point required a careful eye on the process. This experience has made me even more attuned to testing scenarios and anticipating where things might go wrong in similar projects.

In reflection, helping this real estate professional automate their webinar funnel was incredibly rewarding. We took a process that was once chaotic and manual, and transformed it into a streamlined machine that runs in the background. The client can now focus on delivering great webinar content and building relationships, confident that the technology will handle the rest. The success of this project not only solved the client's immediate problems but also provided a repeatable framework for future marketing automation efforts. It's a case study in how thoughtful integration of tools – combined with strategic thinking and problem-solving – can unlock new levels of efficiency for a business.
