


# Case Study

HighLevel CRM Test Assignment: A2P Funnel, Conversation AI & Automation

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OVERVIEW

# Project Summary

This case study documents my completed HighLevel CRM Specialist test assignment. The goal was to demonstrate hands-on knowledge of A2P verification, Conversation AI, Custom Fields, Calendars, Appointments and Workflows by building a working end-to-end system for a sample business.

Since no real client account was used, I created a sample brand, **Precision Appliance Repair**, including its company information and a logo generated for the project. Everything was then built around this brand inside HighLevel.

| Assignment part | What was built | Status |
|---|---|---|
| 1. A2P Verification Funnel | Custom-coded funnel with Home, Privacy Policy and Terms & Conditions pages, SMS consent form and embedded booking calendar | Completed |
| 2. Conversation AI | "Joe", an appliance repair booking assistant with a knowledge base, plus a matching Voice AI agent | Completed |
| 3. Appointment Confirmation Automation | Workflows for form submission, contact creation and booking confirmation | Completed |

## Funnel / page URL

**Funnel URL:**
https://docs.google.com/document/d/1_WOdbw18Dm2WlTxdtgsWevbnDkLIWYxXwZvwIo8iWQ0/edit?tab=t.0
**Screenshots folder:**
https://drive.google.com/drive/folders/1PAnnyrmqzvSpRkc5ApaeoelSztVPSa8S?usp=drive_link

## Brand & Assets

- **Brand name:** Precision Appliance Repair (sample business created for this test).
- **Logo:** generated with Gemini; red and chrome on a dark navy background, combining a gear, wrench, screwdriver and household appliances (fridge, washer, oven).
- **Business details:** name, address, phone and email were created once and reused identically across every page, form and policy for consistency.

PART 1

# A2P Verification Funnel

Funnel built in HighLevel with custom code

## Approach

I built a funnel with custom code so that every element reviewers look for in an A2P 10DLC campaign check is visible, clear and consistent. Customers click **Request a Repair** and a booking calendar pops up; once a time is chosen they complete the form, which includes the SMS consent checkbox.

## Funnel structure

| Page | Purpose |
|---|---|
| Home | Single custom-HTML page with services, how it works, service area and FAQ sections, plus the Request a Repair call-to-action and booking form |
| Privacy Policy | Explains what data is collected, how it is used, and that mobile information is not shared with third parties for marketing |
| Terms & Conditions | Contains the SMS program terms, message frequency, rates, opt-out and help instructions |

## Elements added for A2P verification, and why

| Element | Why it matters for A2P |
|---|---|
| SMS consent checkbox on the form (unchecked by default) | Carriers require clear, affirmative, opt-in consent from the customer before any text is sent. |
| SMS program details next to the checkbox (who is texting, what kind of messages, message frequency, "msg & data rates may apply") | Gives customers full transparency about what they are agreeing to, which reviewers check against the campaign description. |
| STOP / HELP instructions | Proves customers can opt out at any time and get support, a core requirement of carrier compliance. |
| Links to Privacy Policy and Terms & Conditions beside the consent text and in the navigation/footer | Reviewers must be able to find and read both documents directly from the page where consent is collected. |
| Statement that SMS consent is not a condition of purchasing services | Consent must be voluntary; this wording is explicitly expected by carriers. |
| Consistent business name, address, phone and email on every page | A verifiable, legitimate business identity reduces rejection risk during registration. |

| Element | Why it matters for A2P |
| --- | --- |
| Embedded booking calendar and a clear service description | Shows the real use case for the messages (appointment booking and service updates), matching the campaign use case submitted. |

## Calendar and form integration

I created a calendar in HighLevel and embedded it into the custom form using code. When a visitor clicks **Request a Repair**, the calendar appears first, the customer picks an appointment slot, and then fills out their details. This keeps the whole request-and-booking flow on a single page.

## Custom fields

Custom fields were created to store the information the form and the AI collect, such as `appliance_type`, `appliance_brand`, `street_address`, `postal_code` and `phone`, so it can be reused in workflows and messages.

PART 2

# Conversation AI and Voice AI

"Joe" - the Precision Appliance Repair assistant

## Goal

Help customers who contact the company with an appliance problem, answer their questions, and guide them to a booked appointment, by text or by phone.

## Conversation AI settings

| Setting | Configuration |
| --- | --- |
| Bot name / identity | "Joe", with a defined identity, role and tone for Precision Appliance Repair |
| Knowledge base | Company information, services, service call fee, service area and FAQs added so answers stay accurate |
| Mode | Auto-pilot, so Joe replies to inbound inquiries without manual approval |
| Response time-spacing | 8 seconds, so replies feel natural instead of instant |
| Pause on human takeover | Manual message option turned on; the bot pauses when a team member sends a message. Both options enabled to pause on any outbound message |
| Reactivation | Bot automatically resumes after 1 hour of inactivity from the team |

## Conversation flow

Joe follows the booking scenario from the assignment, one question at a time:

- Greets the customer and introduces himself and the company.
- Asks which appliance needs repair, then asks for the brand.
- Informs the customer that the service call fee is **$70**.
- Collects the full address and best phone number, skipping anything already provided.
- Checks the real availability of the Appliance Repair Booking calendar and offers only **one** nearest 3-hour arrival window (e.g. "tomorrow between 12 PM and 3 PM").
- If the customer declines, offers the next available window; otherwise books the appointment.

### Rules the AI follows

| Requirement | How it is handled |
|---|---|
| One question at a time | Instruction in the bot prompt; conversation stays short and natural |
| Never ask for known info | Bot checks what the customer has already provided before asking |
| Save data to the CRM | Appliance type, brand, address, postal code and phone are written to the custom/contact fields |
| Booking only with complete info | Appointment is created only after appliance type, brand, full address and phone are collected and confirmed; phone and address are updated before booking |
| Real availability only | Slots come from the HighLevel calendar; the bot never invents or assumes times |
| Declined time | The next nearest window is offered, one at a time |

### Voice AI

I also set up a Voice AI agent named **Joe**. The voice is configured to sound natural, with filler words, so phone callers get the same helpful experience. Together, Conversation AI and Voice AI aim to answer customer inquiries and then book an appointment, whichever channel the customer prefers.

PART 3

# Workflows and Automations

From form submission to booking confirmation

| Workflow | Trigger | Actions |
|---|---|---|
| Form submission | Inbound Webhook (connected to the funnel form) | Create Contact, then a Wait step so the contact and its fields finish syncing before later steps run |

| Workflow | Trigger | Actions |
|---|---|---|
| Booking confirmation | Appointment created on the calendar | Confirmation email that the request was received; a separate email confirming and reminding the customer of the scheduled appointment |

## How it fits together

- The customer submits the form; the inbound webhook sends the data to HighLevel.
- The workflow creates the contact, then waits so all fields are saved.
- When the appointment is booked, the booking workflow fires and the customer is notified.
- On our side, the booked appointment appears in the calendar for the team to see.

## Testing

I tested the workflows end to end: a test form submission came in through the inbound webhook, the contact was created, a calendar appointment was booked, and the confirmation emails were delivered. **Everything worked as expected.**

EVIDENCE

# Screenshots

Screenshots of the main settings are in the shared Drive folder:

> https://drive.google.com/drive/folders/1PAnnyrmqzvSpRkc5ApaeoelSztVPSa8S?usp=drive_link

| Area | What the screenshots show |
|---|---|
| Funnel | Home, Privacy Policy and Terms & Conditions pages; SMS consent form; calendar pop-up |
| Custom fields & calendar | Created contact fields and the booking calendar configuration |
| Workflows | Inbound webhook workflow and booking confirmation workflow |
| Conversation AI | Bot identity, knowledge base, mode, time-spacing and pause/reactivation settings |
| Voice AI | Joe's voice agent configuration |

## Results and Takeaways

- A compliance-ready funnel with every key A2P element in place and consistent business information.
- A single, smooth path from landing page, to calendar, to form, to CRM contact, to booking.

- AI assistants (text and voice) that qualify the customer, save data to the CRM and book with real availability.
- Workflows tested end to end, and everything worked as expected.
- Automations that confirm each booking so customers are informed and the team can see appointments instantly.

## Possible next steps

- Submit the funnel for A2P brand and campaign registration.
- Run test conversations and bookings to fine-tune Joe's prompts.
- Add reminder SMS before the appointment and follow-up review requests.