

# Protect CEO Time

Building a self-running hiring pipeline for First Family Trust, a tax and financial services firm based in Florida, so leadership only ever meets candidates who've already proven they can do the job.

| ROLE                | PLATFORM           | SCOPE                           | CLIENT                            |
|---------------------|--------------------|---------------------------------|-----------------------------------|
| Automation Engineer | GoHighLevel + Zoom | 13 workflows, 11-stage pipeline | First Family Trust (Florida, USA) |

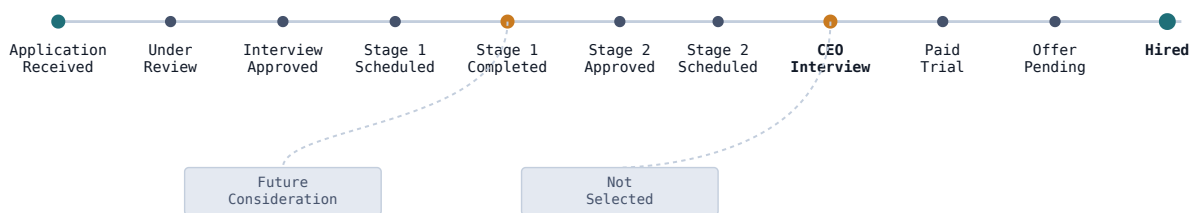


Fig. 1 — the full candidate pipeline as built in the CRM. Solid nodes mark the three points where a human makes the call; every other move is automated.

## 01 The problem

First Family Trust's operations guide described exactly the hiring process it wanted, but nothing in the CRM actually ran it. Candidates were tracked manually, scheduling depended on someone remembering to follow up, and there was no way for leadership to see recruiting status without asking.

Worse, the CEO's calendar had no protection built in — there was nothing stopping an unqualified applicant from ending up in a founder-level interview simply because no earlier stage had filtered them out.

## 02 What was built

A fully automated pipeline covering the entire path from a stranger filling out a form to a signed offer — thirteen workflows deep, with nothing left for a human to remember to do.

**13**

automated workflows

**11**

pipeline stages

**2**

dedicated Zoom  
rooms

**3**

reminder intervals  
per interview

### INTAKE

#### Self-service application form

A public form captures name, contact info, resume, and a video introduction, then creates the candidate's file and drops them at Application Received the instant they submit — no manual entry.

### SCHEDULING

#### Two permanent interview rooms

Dedicated recurring Zoom rooms for screening and assessment, locked to spec — waiting room, passcode, muted entry — wired into the automations so links never go stale.

### COMMUNICATION

#### Stage-triggered candidate emails

Every pipeline move fires the matching email automatically — acceptance, confirmation, reminders at 24h / 2h / 15m, and a message even when a candidate isn't moving forward.

### VISIBILITY

#### Live leadership dashboard

Funnel counts by stage and an upcoming-interviews list, both reading live off the pipeline, so status is visible without asking anyone.

## 03 Where the decisions happen

Three points in the pipeline are deliberately left to a human — everywhere else, the system moves the candidate itself.

### ADVANCE

Candidate clearly meets the bar → auto-routed to the next stage, next invite sent immediately.

### HOLD

Competitive but unproven against the field → stays put for direct comparison before a call is made.

### DECLINE

Not moving forward → routed to Not Selected or Future Consideration, and still receives a respectful email either way.

## 04 Field notes — what testing actually caught

Before handoff, a synthetic candidate was run through all thirteen workflows the way a real applicant would use them — including submitting the live public form, not just dragging cards on a board. That surfaced five real defects a build-time review never would have.

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### DEFECT 01

#### Stage advance silently failing

Two workflows updated a candidate's stage only when triggered from an appointment booking — but a booking trigger carries no opportunity context, so the update quietly did nothing.

FIX – Added an explicit opportunity lookup ahead of the update in both workflows.

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### DEFECT 02

#### Outcome branch tagging without emailing

The Not Selected / Future Consideration branch correctly tagged candidates but never actually sent them anything.

FIX – Built and attached the missing email to both outcome branches.

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### DEFECT 03

#### Dashboard counting the wrong appointments

The upcoming-interviews widget used status and calendar as separate OR conditions instead of pairing them — which would have counted appointments with the right status on the wrong calendar.

FIX – Re-nested the logic so status is scoped inside each calendar condition.

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### DEFECT 04

#### No actual way in

Every stage from Application Received onward worked — but no public application form existed yet, so nothing could reach the first stage without a human manually creating it.

FIX – Built the intake form and its opportunity-creation workflow, tested live.

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## Interview date missing from a confirmation email

A merge-tag mismatch meant the Stage 2 confirmation showed a blank date and a time field that had silently absorbed the full timestamp instead.

FIX – Rebuilt the date/time line and re-verified with a live booking.

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## 05 Outcome

The client now runs hiring end to end without manual follow-up at any stage — from a stranger finding the listing to a signed offer. Leadership sees pipeline health on one live screen instead of asking their team for status, and the CEO's calendar is structurally protected: nobody reaches a founder-level interview without first clearing two independent, scored evaluations.

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Built solo for **First Family Trust** — pipeline design, all 13 workflows, dashboard, and QA.

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