

Blueprint Briefing Website Lead Handoff

A simple guide to what the website now sends into GHL, what Tim should expect, and what is deliberately not automated yet.

CURRENT STATE

Capture is live. Subscriber messaging is not.

A successful website signup creates or updates one GHL contact. No welcome email, newsletter campaign, drip, SMS, voice, or WhatsApp workflow currently messages this audience.

What Tim needs to know

The subscriber should appear as one contact with the existing email opt in tag. GHL should preserve any prior Lead Source, Contact Source, tags, and Email DND state.

What Tim does not need to build

No new fields, tags, Opportunities, reports, or messaging workflows are required at this stage.

WHY THIS MATTERS IN THE Q3 BRIEF

BRIEFING SECTION	MEANING
Part I - Tim's Sandbox	GHL is Tim's operating surface; clean contact records make future automation safe.
Part II - Lane 03, Stage 1	The website now captures Blueprint Briefing subscribers into the owned audience.
Part III - Play 01	Native campaigns and nurture come later, after the audience and sending setup are ready.

The operating principle

A newsletter signup is consent to receive Blueprint Briefing email. It is not automatically a booking, an Opportunity, or permission for phone/SMS outreach.

What Tim should expect in GHL

One contact, one consent tag, and no unnecessary CRM changes.

CONTROL	EXPECTED RESULT
Contact	Exactly one contact with the submitted full name and email. A repeat signup should update the same contact, not create another.
Consent	The exact existing tag email opt in is present. Existing tags remain.
Lead Source	Website is used only when Lead Source was blank. Partner, Warm Network, or another existing value remains unchanged.
Contact Source	May be blank or retain an existing GHL-native value. Tim should not manually change it.
Email DND	Remains unchanged. A signup never clears an existing email restriction.
Sales + messaging	No Opportunity and no automatic message are created solely because of the newsletter signup.

Lead Source

Blueprint's business attribution field. Website is only the fallback when the field is blank.

Contact Source

GHL's native creation attribution. It may be blank and should be left alone.

WHY THE DESIGN IS SIMPLE

The website API is the only contact writer.

GHL External Tracking remains available for passive page/form analytics, while native Form Submissions is off because testing showed it could overwrite Contact Source. The API adds the consent tag without removing existing tags and changes Lead Source only when blank.

Only flag an obvious exception

Tell Martin if a confirmed signup produces no contact, creates a duplicate, is missing email opt in, overwrites an existing Lead Source, or changes Email DND. Otherwise, no action is required.

For now, keep it simple

Tim needs orientation, not a new recurring workload.

NO RECURRING CADENCE

No daily report or daily contact review is required.

At current volume, the website and the temporary seven-day health monitor carry the routine checks. Tim only needs to recognize the expected record and flag an obvious exception if one appears.

WHEN BLUEPRINT IS READY TO START EMAIL

STEP	USE GHL NATIVELY
1 - Prepare sending	Authenticate a branded LC Email sending domain. Enable GHL's native email verification, 90-day re-verification, unsubscribe, and Email DND controls.
2 - Send the first issues	Build one dynamic audience: email opt in AND Email DND off. Send the first Blueprint Briefing issues as native one-time campaigns and review delivery, replies, clicks, complaints, and unsubscribes.
3 - Automate only after proof	If the first issues and capture remain healthy, add one simple welcome/nurture workflow using GHL's native tag trigger, Send Email, Wait, and reply/click events.

Not now

No daily cadence, A/B testing, extra taxonomy, Opportunity automation, or multi-channel subscriber outreach.

Next real action

Observe normal opt-ins. When the first Blueprint Briefing issue is ready, start with the sending domain and native safety controls.

The 80/20 end state

Website capture -> one consented GHL contact -> one dynamic email audience -> native campaigns -> one measured welcome/nurture workflow. Nothing more is needed for this stage.

[Sending domains](#) | [Email verification](#) | [Recipient segments](#) | [Regular campaigns](#) | [Tag workflow trigger](#)