

Roadblock Completion Dossier

A control-by-control teardown of the three active roadblocks in Tim's domain, scored against the live GoHighLevel account, the build documentation, and the communication-channel standard.

COMPANION TO

Q3 Sprint Briefing · brief.blueprintglobal.io

Scope and method

ITEM	DETAIL
Subject	Blueprint Global GoHighLevel sub-account, location <code>dAkk8qSHTRCKAHhFdj8S</code>
Roadblocks covered	Multi-Channel Messaging Infrastructure (P2), Contact Intelligence (P3), Outreach Execution (P4). All three are assigned to Tim.
Evidence base	Read-only live API audit of the account; the eight-workstream build documentation; the Conversations & SLA implementation plan; the Five Remaining GHL Considerations; the ClickUp OKR and roadblock tables.
Method	Every control is stated as current state, gap, and the specific action that closes it, with each fix marked as a GoHighLevel setting or as work that lives outside the platform.
What this does not do	It changes nothing in the live account. No configuration was modified during the audit and no customer data was altered.

Scoring is deliberately conservative. Where a control is arguable it is scored down, not up. A capability counts as done only when there is evidence it works, not merely evidence it is configured. Percentages are intended to under-claim rather than flatter, so that progress reported later is real.

Summary of findings

ROADBLOCK	SCORE	HEADLINE
Multi-Channel Messaging Infrastructure Scored email-first	45%	Email identity and deliverability are solid, but nothing is proven end to end, inbound voice reaches nobody, and WhatsApp is unconfirmed.
Contact Intelligence Scored on the data	20%	The schema and form mapping are built and verified working. The records inside are thin, which is what the roadblock is actually about.
Outreach Execution Scored on the system	10%	Pipelines and calendars exist. Zero published automation, and no rule deciding manual versus automated.

Why each is scored the way it is. Channel infrastructure is measured **email-first**, because the SLA explicitly defers SMS, WhatsApp, and voice until there is proven need; scoring against full multi-channel would penalise deliberate restraint. Contact Intelligence is measured on the **data** rather than the schema, since the roadblock names reliability of records as the problem. Outreach Execution is measured on the **system**, and it is sequenced last because it depends on the other two being closed first.

Multi-Channel Messaging Infrastructure

45%

Email carries one hundred per cent of real traffic today and its foundations are sound. The score is held down because no channel has documented end-to-end proof, inbound voice currently dead-ends, and WhatsApp cannot be confirmed as connected.

CONTROL	CURRENT STATE	GAP	HOW TO CLOSE IT
Email identities	Done. team@blueprintglobal.io is the human mailbox; team@mail.blueprintglobal.io is the automated sender. Cleanly separated.	None.	—
Email deliverability	Done. SPF, DKIM and DMARC pass on the dedicated sending domain, verified at build closeout.	Live status is not exposed through the API.	Spot-check once in GHL Settings → Email Services.
Default email service	Partial. The location has no default sending service selected; the field is empty.	Sends may fall back to a default rather than the intended service.	Select the dedicated service in GHL Settings → Email Services.
Threading and reply continuity	Done. A controlled inbound test produced exactly one conversation and one contact, with no duplicate reply.	None.	—
SMS number	Partial. One Twilio number, +1 289-207-7737, registered in Ontario, Canada. Voice, SMS and MMS capable, set as default.	The operating entity is US (Wyoming) but the only number is Canadian, so US prospects see a foreign number.	Decide Canada-only versus adding a US number in GHL Phone Numbers. A business decision, not a configuration defect.
A2P registration	Not required. Canadian long code, so US 10DLC brand and campaign registration does not apply. The empty bundle is expected behaviour.	Becomes mandatory the moment a US number is added.	If a US number is introduced, register brand and campaign in GHL Trust Center before any send.
Opt-out handling	Unverified. Not exposed through the API.	STOP, HELP and DND behaviour is unconfirmed.	Confirm in GHL phone settings before any outbound SMS campaign.
SMS consent capture	Partial. Two consent fields exist on the contact record, marketing and non-marketing.	No automation reads them, so consent is captured but not enforced at send time.	Gate every SMS send on the consent field using a GHL workflow.
WhatsApp	Unconfirmed. Set up on 18 August, but no WhatsApp provider is visible through the API and no genuine message has been sent or received. The only WhatsApp traffic on record is verification-code stubs.	Cannot confirm the channel is connected and message-capable.	Verify in GHL Settings → Conversations, then send one real message in each direction and record the result.
Voice routing	Not configured. No forwarding number and no ring-all users are set, so an inbound call currently reaches nobody.	Any prospect who telephones the published number is lost silently, with no voicemail and no record.	Set forwarding or ring-all in GHL number settings. Fast to fix, high consequence if left.
Voicemail and hours	Not configured so far as can be verified. Settings are UI-only.	No greeting and no after-hours path.	Configure alongside routing in GHL .
Send and receive proof	Missing. No documented end-to-end test exists for any channel.	This is the evidence that turns configured into trusted, and its absence is the single largest reason for the score.	Outside GHL Run three to five test contacts per live channel and record the outcome in writing.

Failure ownership	Not running. A monitoring cadence is defined in the plan but nobody owns it.	Delivery failures, registration expiry and route drift would go unnoticed.	Outside GHL Name an owner and fold the check into the daily routine.
-------------------	---	--	--

The one urgent item. Inbound voice reaching nobody is the only gap here that silently loses a real prospect with no trace. Everything else is either deliberately deferred or cosmetic. The recommended order is: fix voice routing, then prove WhatsApp end to end, then leave the remaining channels parked until there is demonstrated demand.

Cross-check against the build record. The workstream audit flagged two unexpected WhatsApp verification-code conversations as possible security signals. These align with the authorised WhatsApp setup of 18 to 19 August. They should be confirmed as expected and then closed out, and should not be deleted before that confirmation.

Contact Intelligence

20%

The infrastructure is complete and the form-to-field mapping is verified working. The score reflects the records themselves, which are sparse: roughly half the base cannot be reached by email and the qualification fields are close to empty.

CONTROL	CURRENT STATE	GAP	HOW TO CLOSE IT
Intake schema	Done. Twenty-eight custom fields covering journey, residency, income, goals, consent and lead source.	None. The structure is complete.	—
Form to field mapping	Verified working. Every field any human has actually submitted has landed correctly on the contact record, across both intake forms.	None.	—
Custom intake application	Proven in code, unproven live. The field mapping resolves correctly and the health endpoint reports zero failed syncs, but no genuine external submission has yet passed through.	The live HTTP path has never been exercised by a real submitter.	One deliberate test submission through the live form settles it conclusively.
Contact volume	Forty-seven contacts. Forty of them were keyed manually into the CRM in a bulk load and carry only Journey and Lead Source.	The base is small and largely un-enriched by origin rather than by any failure.	Volume is produced by the outreach engine, not by a configuration change.
Reachability	Thin. Fifty-one per cent hold an email address and sixty per cent a telephone number. Eleven contacts have neither.	Roughly half the base cannot be reached on the primary channel.	Enrich or retire the unreachable records. This is a direct input to the messages key result.
Qualification depth	Sparse. Annual Income thirteen per cent, Primary Goal four per cent, Tax Residence two per cent, Residence Status two per cent.	Insufficient signal to target or prioritise outreach intelligently.	Capture properly on every call, and backfill the live prospects by hand.
Lead source hygiene	Weak. Thirty of forty-seven contacts carry no recorded source at all.	It is not possible to tell which channels genuinely produce, which undercuts the diagnostics key result.	Stamp a source on every entry point and on every manual addition.
Segmentation	Unused. Three tags exist and no contact carries any of them.	No means of slicing the base for a targeted campaign.	Define a small tagging convention and apply it by GHL workflow or import.
Working list	Roughly sixteen to twenty-four contacts are genuinely reachable and worth enriching.	That is the real denominator for re-engagement, not forty-seven.	Build the working list first, then run the manual campaign against it.

A correction to an earlier reading. A preliminary pass suggested the intake form mapping was broken, on the basis that deep intake fields were populated on only two to four per cent of contacts. That conclusion was mistaken. It measured intake-only fields against all forty-seven contacts, when forty of those were entered manually and never touched a form. Examined against the correct denominator, every field any submitter has actually completed has landed on the record: four of four for the first diagnostic submitter, two of two for the partner submitter, and every answered field across seven internal test submissions. The mapping is sound; the low percentages are a volume fact, not a defect.

Consequence for sequencing. Because nothing here is broken, this roadblock is closed by habit rather than by build work: capture well on every call, stamp sources, and enrich the live prospects. It gates the messages key result directly, since a contact

who cannot be reached cannot be messaged.

Outreach Execution

10%

The rails are built and sound. Nothing runs on them automatically, and no written rule decides what receives personal attention versus automated enrolment. This roadblock is sequenced last by design.

CONTROL	CURRENT STATE	GAP	HOW TO CLOSE IT
Pipelines and stages	Done. Five pipelines covering customer, partner, subcontractor, CPA and fulfilment.	None structurally.	—
Calendars	Done. Nine calendars, each mapped to the pipeline stage it feeds.	Appointments are not being marked Showed or No-show, so completion cannot be read from the calendar.	Adopt as a daily habit and the diagnostics key result becomes self-tracking.
Published automation	None. No published workflows. One remains in draft.	Nothing fires on a new lead, a booking, a no-show or a payment.	Publish the three workflows below, once manual outreach has proven the message.
Campaigns	None. No campaigns and no scheduled email exist.	No repeatable send motion.	Begin with the Blueprint Brief newsletter.
Manual versus automated rule	Undefined. No rule governs what receives personal attention and what is enrolled in a sequence.	This is the heart of the roadblock, self-rated at eight and a half out of ten.	Outside GHL Write the rule down: who always receives a human, who receives a sequence.
Partner activation flow	Not started. Referral-engine subtask.	Required for the manage half of the thirty-partner key result.	Build once the first partners have been re-engaged manually.
Partner nurture cadence	Not started. The bi-weekly sequence remains outstanding.	Signed partners go quiet without a regular drumbeat.	Second workflow to publish.
Onboarding sequence	Not started.	A closed client has no automated path into delivery.	Third workflow. Feeds the first full implementation milestone.

The three workflows to publish

WORKFLOW	PURPOSE
The Blueprint Brief	A newsletter keeping the whole base warm on a regular cadence, so no contact goes cold between touches and every send is a legitimate reason to re-engage.
Partner nurture	Bi-weekly reminders keeping signed referral partners active and producing. This is the automation that turns the manage half of the partner key result into a system rather than a memory.
Customer onboarding	The sequence carrying a new client from close into delivery without a dropped step, feeding directly into the first full implementation.

Why the low score is acceptable. Outreach cannot be systematised to contacts who cannot be reached, over channels that are not yet trusted. The position at ten per cent reflects sequencing rather than neglect. The recommended order is to clear voice routing and build the working contact list, run the manual re-engagement campaign, and then automate precisely what proved effective.

Evidence base and recommended order

Live account baseline at the time of audit

PIPELINES AND CALENDARS Five pipelines; nine active calendars, each mapped to a funnel stage, with verified notification rows.	OPPORTUNITIES Thirty-three records, of which two are won, both on the partner side. Most carry no monetary value.
CONTACTS Forty-seven, of which forty were bulk-entered manually. Fifty-one per cent hold an email address.	CONVERSATIONS Forty-three records, of which twenty-six are no-show entries carrying no message and ten are internal or test threads.
GENUINE MESSAGE TRAFFIC Seven external people, approximately sixteen to thirty-five real messages, effectively all by email.	AUTOMATION No published workflows. One draft. No campaigns and no scheduled email.

Recommended order of action

ORDER	ACTION	RATIONALE
1	Configure inbound voice routing and voicemail	The only open gap that silently loses a real prospect. Fast to close.
2	Begin marking appointments Showed or No-show	Makes the diagnostics key result self-tracking from the calendar rather than by inference.
3	Confirm WhatsApp and prove one channel end to end	Converts a configured channel into a trusted one, and closes the largest scoring gap in the first roadblock.
4	Build the working contact list and enrich it	Sixteen to twenty-four reachable contacts is the true denominator for re-engagement.
5	Stamp lead source on every entry point	Without it there is no way to know which channels genuinely produce.
6	Run manual re-engagement into calendar bookings	Proves which message and which segment respond before any automation is built.
7	Publish the three workflows	Automation scales a proven message. It should never scale an unproven one.
8	Name an owner for delivery monitoring	Ensures failures and route drift are noticed rather than discovered late.

Relationship to the five remaining GHL considerations. The second consideration, communication-channel infrastructure, is covered in full by the first roadblock in this dossier and is governed by the Conversations and SLA implementation plan. The first consideration, post-sale service delivery and the client portal, sits outside this dossier and is being handled within the offer and onboarding workstream. The remaining three considerations are deliberately parked behind their stated adoption triggers.

Standard applied throughout. A control is marked done only where there is evidence that it works in practice. Configuration alone, however carefully done, is recorded as partial. This standard is what produces the conservative scores in this document, and it is the same standard by which progress should be claimed later.