

Go HighLevel - Retell Integration

Summary

This system streamlines referrals into confirmed appointments using an AI-driven workflow. Once a referral form is submitted, an intelligent voice agent automatically calls the patient to collect necessary details and confirm availability. Based on the interaction, the system schedules the appointment and updates it directly in Go High Level CRM.

Key Components

- **Web interface:** for submitting referral information
- **Go High Level (GHL):** CRM system for opportunity management and tracking
- **Retell AI Voice Agent:** Conversational AI for conducting outbound calls

Flow

1. **Referral Submission:** User submits a web referral form through this URL: <https://d35xgdvzlrda7i.cloudfront.net/>
2. **Opportunity Creation:** Referral data is sent to Go High Level and stored as an opportunity in "New Referral" stage
3. **Voice Agent Initiation:** Retell AI agent API is simultaneously triggered to initiate an outbound call to the referral
4. **Call Execution:** Voice agent conducts conversation to collect appointment details
5. **Status Updates:** Opportunity status is automatically updated in GHL based on call outcomes
6. **Data Storage:** Call transcript and appointment details are stored in the GHL opportunity card

Referral Data Collection

- **Frontend Form Fields**
 - Patient:*** Full Name, Date of Birth, Gender, Email Address, Phone Number
 - Referrer:*** Referrer Name, Referrer Contact(Email/Mobile)

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Go High Level Pipeline Management

Opportunity Stages

The system utilizes a structured pipeline with the following stages:

Stage Name	Description
New Referral	Initial stage when referral details are submitted through the frontend form
Contacted	Moved here once the outbound call has been initiated by the Retell agent
Appointment Booked	Successfully completed calls where all appointment details have been collected. Opportunity marked as "Won"
Not Interested	The user answered the call but declined to proceed with appointment booking. Opportunity marked as "Lost"
Not Reachable	The user did not answer the outbound call. Opportunity marked as "Abandoned"
Partially Hung Up	Users disconnected during the conversation or did not respond for more than 5 seconds. Opportunity marked as "Partial"
Appointment Kept	After the patient's appointment visit

Conversational Flow

Call Initiation

The voice agent follows a structured conversation path:

- Greeting and Identity Verification**

Agent: "Hello, may I speak with [patient_name]?"

The agent verifies if the person answering is the intended referral.

- Logic Split: Identity Confirmation**

If the person confirms they are the referral, proceed to appointment scheduling.

If the person denies being the referral, mark the opportunity as "Lost" & move to the "Not Interested" stage.

- Appointment Scheduling Offer**

The agent presents the opportunity to schedule an appointment.

If declined: Move to "Not Interested" stage, mark as "Lost"

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If accepted: Proceed to collect appointment details

Appointment Details Collection

The agent systematically collects the following information:

4. Location Selection

EX Available locations: Macon, Riverdale, Smyrna, Albany, Huntsville, Stonecrest, Lagrange

Agent extracts the chosen location and confirms with the patient

5. Appointment Type

Available types: Follow Up, Injection, New Patient

Agent confirms the selected type before proceeding

6. Preferred Date

Agent presents available dates and asks for patient preference.

Patient confirms the selected date

7. Time Slot Selection

Available slots: 10 AM-11 AM, 11 AM-12 PM, 12 PM-1 PM, 1 PM-2 PM

Agent validates the time selection and confirms

8. Final Confirmation

Agent summarizes all appointment details: Location, Type, Date, Time
Requests final confirmation before submitting

If confirmed: Mark opportunity as "Won", move to "Appointment Booked"

If rejected: Return to location selection to restart the process

Call Outcome Scenarios

Outcome Scenario	Trigger	Actions
Successful Appointment Booking	User completes the entire conversational flow and confirms all appointment details	• Opportunity status: Won • Pipeline stage: Appointment Booked • Appointment details stored in GHL opportunity card • Call transcript saved to opportunity card
User Not Interested	User either denies being the referral or declines appointment scheduling	• Opportunity status: Lost • Pipeline stage: Not Interested • Call transcript saved to opportunity card

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Call Not Answered	User does not pick up the outbound call	• Opportunity status: Abandoned • Pipeline stage: Not Reachable • Call attempt logged in opportunity card
Call Disconnected Mid-Conversation	User hangs up during the conversation or remains silent for more than 5 seconds	• Opportunity status: Partial • Pipeline stage: Partially Hung Up • Partial appointment details (if any) saved to opportunity card • Call transcript saved to opportunity card

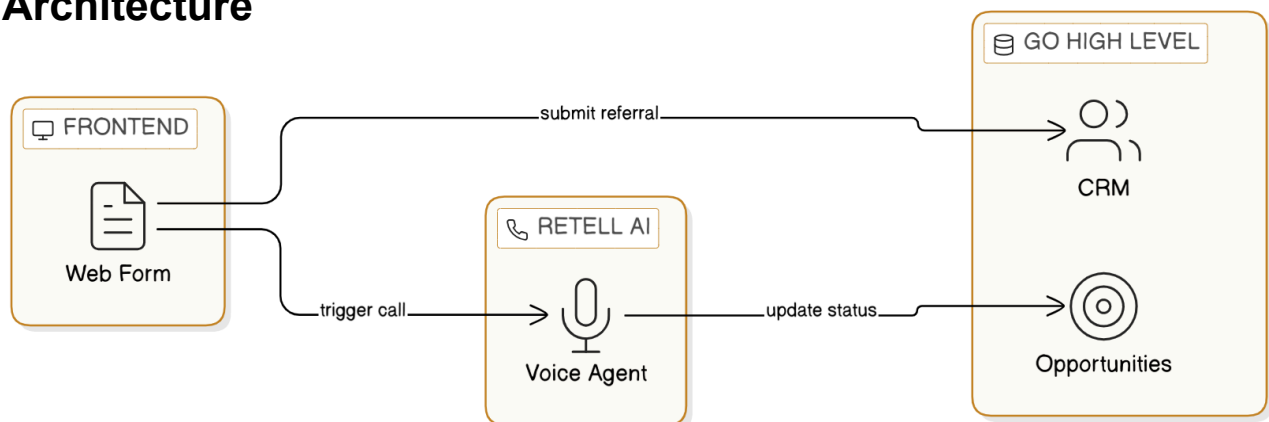
Data Storage and Tracking

GHL Opportunity Card

Regardless of call outcome, the following information is always stored in the Go High Level opportunity card:

- **Complete Call Transcript:** Full conversation between agent and referral
- **Appointment Details:** Location, type, date, and time (if collected)
- **Call Metadata:** Duration, timestamp, outcome status
- **Referral Information:** Original submission details from frontend form

Architecture



Demo Video: <https://youtu.be/XhQkyj0W0JI>