GoHighLevel Quick-Start Checklist

A practical launch checklist for small businesses, agencies, consultants, and freelancers.

Goal: Get the essentials configured before you start driving leads into your account.

How to use this checklist

- [ ] Complete each section in order. Do not build complex automations before your business profile, calendar, email, and phone setup are correct.
- [ ] Test every customer-facing step yourself: form submission, booking, email, SMS, workflow, and pipeline movement.
- [ ] Treat SMS compliance and usage-based costs as setup items, not afterthoughts. Requirements and fees can change by country, carrier, and product usage.

Keep this simple: your first objective is a reliable lead-to-follow-up flow, not a complicated automation maze.

Core Setup Checklist

Build the foundation first. These are the items most likely to create problems later if skipped.

01. Business profile & account basics

- [ ] Confirm business name, address, website, timezone, and contact information are accurate.
- [ ] Add the right users/team members and give only the permissions they need.
- [ ] Decide who owns new leads, conversations, appointments, and opportunities.

Quick note: Incorrect timezone or ownership settings can quietly break calendars, reminders, and reporting.

02. CRM & pipeline

- [ ] Create a simple pipeline that matches your real sales process (for example: New Lead -> Contacted -> Qualified -> Booked -> Won/Lost).
- [ ] Create only the custom fields you will actually use.
- [ ] Import contacts carefully and check formatting before turning on automations.

03. Booking calendar

- [ ] Create your booking calendar and connect the correct team member.
- [ ] Connect your Google/Outlook calendar and configure conflict calendars to prevent double-booking.
- [ ] Set availability, meeting duration, buffers, timezone behavior, and reminders.
- [ ] Book a test appointment from the public calendar page.

Quick note: HighLevel supports linked/conflict calendars so external events can block unavailable time.

04. Email sending

- [ ] Set up a dedicated sending domain or subdomain in Settings -> Email Services when appropriate.
- [ ] Add the DNS records HighLevel provides and verify them before sending campaigns.
- [ ] Set the From Name and From Email you want customers to see.
- [ ] Send test emails to Gmail/Outlook and check inbox placement, links, reply handling, and branding.

Quick note: A dedicated sending domain can improve authentication, sender reputation, and deliverability.

Communication, Automation & Launch

Finish the customer journey, then test it end-to-end before you spend money on traffic.

05. Phone & SMS

- [ ] Add or connect the phone number you will use for calls and SMS.
- [ ] If you send business SMS from a US 10-digit local number, complete the applicable A2P 10DLC Brand and Campaign registration before relying on SMS.
- [ ] Document how customers give consent to receive messages and keep opt-out language where required.
- [ ] Review current messaging, registration, phone-number, and usage fees before launch.

Quick note: A2P 10DLC registration requirements apply to US business messaging on standard 10-digit local numbers; carrier review is part of the process.

06. Automations & follow-up

- [ ] Start with one essential workflow: new lead acknowledgement + internal notification + follow-up sequence.
- [ ] Add appointment confirmation/reminder workflows only after your calendar works correctly.
- [ ] Add clear stop conditions so people do not keep receiving messages after booking, replying, or converting.
- [ ] Use a test contact and confirm every step fires once - not twice.

07. Forms, tracking & final QA

- [ ] Submit every live form yourself and confirm the contact lands in the right pipeline/stage.
- [ ] Click every CTA and verify the destination URL, mobile behavior, and tracking event.
- [ ] Check your website on desktop and mobile.
- [ ] Confirm privacy, terms, and affiliate disclosures are visible where appropriate.
- [ ] Only then start sending traffic or launching ads.

Final Launch Check

A short pre-launch review to catch the mistakes that usually create avoidable problems.

Common mistakes to avoid

- [ ] Building too many workflows before the core funnel works.
- [ ] Sending SMS before understanding registration/consent requirements.
- [ ] Using an unverified sending domain or skipping email deliverability tests.
- [ ] Forgetting conflict calendars, causing double bookings.
- [ ] Importing a messy contact list and immediately triggering bulk automation.
- [ ] Assuming platform subscription price is the only cost - phone, messaging, email, AI, and other usage can add variable charges.

Quick reference inside HighLevel

- [ ] Business profile & users: confirm identity, timezone, ownership, and permissions.
- [ ] Opportunities / Pipelines: keep the sales stages simple and aligned with the real process.
- [ ] Calendars: verify availability, external calendar connection, conflicts, and reminders.
- [ ] Email Services: verify your sending domain, sender identity, and test delivery.
- [ ] Phone / SMS: verify phone setup, consent process, applicable registration, and current usage costs.
- [ ] Workflows: test each trigger, wait step, stop condition, and message with a test contact.

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