

FREE CHECKLIST · 2026 EDITION

The GoHighLevel Setup Checklist

63 checks for a GoHighLevel account that replies instantly, books more appointments and never lets a lead slip through.

- ✓ Account foundations & pipelines
- ✓ Speed-to-lead and lead capture
- ✓ Calendars and no-show prevention
- ✓ Workflow hygiene
- ✓ Email & SMS deliverability
- ✓ Reviews, reporting and security

How to use this checklist

We audit GoHighLevel accounts every week, and the same issues come up again and again: leads waiting hours for a reply, workflows sending duplicate messages, emails landing in spam, and pipelines nobody trusts. This checklist is the list we work through.

Go through it with your account open. Tick each item that is genuinely done, not "mostly done". Anything unticked is an opportunity: a lead you could be winning or a problem waiting to happen.

1. Work section by section
Each section takes 10 to 20 minutes. Start with sections 1 and 2; they have the biggest impact on revenue.

2. Be honest
If you are not sure whether something works, test it with a test contact before ticking it.

3. Fix the gaps
Prioritise anything that affects new leads: speed-to-lead, booking and deliverability.

Your score

Checks ticked	What it means
55 – 63	Excellent. Your account is in great shape; focus on optimisation and testing.
40 – 54	Solid foundation with gaps that are probably costing you leads. Fix the unticked items in sections 1, 2 and 5 first.
25 – 39	Significant leaks. Leads are likely going unanswered or undelivered. Prioritise speed-to-lead and deliverability this week.
Under 25	Your account needs a rebuild of its foundations. Consider professional help to avoid losing more leads.

1

Account foundations

A clean structure makes everything else reliable.

- ☐ **Business profile complete:** name, address, phone, time zone and logo are set correctly in the sub-account.
- ☐ **Time zone verified** for the account and each calendar, so reminders arrive at sensible local times.
- ☐ **Custom fields planned** and named consistently, with no duplicates such as "Phone 2", "phone_alt" and "Mobile".
- ☐ **Tags follow a naming convention** (for example *source-facebook*, *status-customer*) and obsolete tags are removed.
- ☐ **Custom values used** for business name, phone, address and booking links in funnels and messages.
- ☐ **Pipeline stages match your real sales process**, from new lead to won or lost.
- ☐ **Lost reasons captured** when opportunities are marked lost, so you can see why deals fail.
- ☐ **Users have the right permissions:** staff see what they need, not billing or settings.
- ☐ **Smart lists saved** for the views your team uses daily, such as new leads today and overdue follow-ups.

2

Lead capture & speed-to-lead

The first business to reply usually wins.

- ☐ **Every lead source flows into GoHighLevel:** website forms, ad lead forms, chat, calls and directories.
- ☐ **Each lead is tagged with its source**, so you know which channel produces customers.
- ☐ **Forms are short:** only the fields you actually use, ideally five or fewer.
- ☐ **Consent wording** is on forms that collect phone numbers, if you send SMS.
- ☐ **An instant reply is sent** by SMS and/or email within a minute of every new enquiry.
- ☐ **The first message invites a reply** with a question or booking link, not a generic "thanks".
- ☐ **The team is notified** of new leads in real time, with the right person assigned.
- ☐ **Missed-call text back** is enabled during business hours.
- ☐ **Follow-up continues** for several days if the lead does not respond, then moves to long-term nurture.

Quick test: fill in your own website form from your phone right now. How long until you get a reply? If it is more than a minute, start here.

3

Calendars & no-show prevention

Booked is good. Attended is what pays.

- ☐ **Separate calendars** exist for each appointment type, with the right duration and buffers.
- ☐ **Availability matches reality:** staff schedules, holidays and minimum notice are set.
- ☐ **External calendars synced** (for example Google or Outlook) to prevent double-booking.
- ☐ **The booking form asks only essential questions.**
- ☐ **Instant confirmation** is sent by SMS and email after booking.
- ☐ **Reminders are sent** about a day before and again on the day, with a reschedule option.
- ☐ **No-shows trigger follow-up:** a friendly rebooking message and a task for the team.
- ☐ **Booked appointments update the pipeline** stage automatically.
- ☐ **Deposits or card on file** are considered for high-value appointments, with a clear cancellation policy.

4

Workflow & automation hygiene

Automations should help customers, not spam them.

- ☐ **Workflows have clear names** (for example *[Lead] Speed to lead – Website form*) and live in folders.
- ☐ **No overlapping triggers:** one event does not start two workflows that message the same contact.
- ☐ **Re-entry settings checked**, so contacts do not get the same sequence twice by accident.
- ☐ **Goal events stop sequences** when someone books, buys or replies.
- ☐ **Quiet hours respected**, so SMS is not sent late at night in the contact's time zone.
- ☐ **Unused and draft workflows** are archived or deleted.
- ☐ **Every published workflow has been tested** with a test contact, including edge cases such as missing phone numbers.
- ☐ **Long-term nurture exists** for leads who are not ready yet.
- ☐ **Each workflow's purpose is documented** in a short note or video.

5

Email & SMS deliverability

The best message fails if it never arrives.

- ☐ **A dedicated sending domain** (such as *mail.yourdomain.com*) is set up and verified.
- ☐ **SPF and DKIM pass**, and there is only one SPF record on the domain.
- ☐ **A DMARC record is published**, and its reports are monitored.
- ☐ **Marketing emails include a one-click unsubscribe**, and unsubscribes are honoured.
- ☐ **New domains are warmed up** gradually, starting with your most engaged contacts.
- ☐ **No purchased or scraped lists**; hard bounces are removed.
- ☐ **Unengaged contacts** are sunset or re-engaged instead of being emailed forever.
- ☐ **SMS registration completed** where required, such as A2P 10DLC for texting US numbers.
- ☐ **STOP and opt-out requests are honoured** immediately, and messages avoid spammy patterns.

6

Reviews & reputation

Reviews win searches and trust.

- ☐ **Google Business Profile connected** to GoHighLevel.
- ☐ **Review requests sent automatically** after a completed job, visit or purchase.
- ☐ **The request links directly** to your Google review page.
- ☐ **One gentle reminder** is sent if the customer has not clicked.
- ☐ **Every review gets a reply**, including negative ones, within a few days.
- ☐ **Unhappy feedback is routed** to a manager quickly so issues can be resolved.
- ☐ **No incentives are offered** in exchange for reviews, and every customer is asked, not just happy ones.
- ☐ **Review numbers are tracked** monthly.
- ☐ **Reviews are showcased** on your website and funnels with customer permission.

Reporting, integrations & security

Know what works, and keep it safe.

- ☐ **A dashboard shows the numbers that matter:** new leads, booked appointments, show rate and won revenue.
- ☐ **Ad platforms and conversions are connected**, so you can see cost per lead and per customer.
- ☐ **Call tracking numbers** are used for major campaigns.
- ☐ **Payments and invoices** run through a connected processor where relevant.
- ☐ **Integrations are documented:** what connects to what, and who owns each login.
- ☐ **Two-factor authentication** is enabled for all users.
- ☐ **Former staff and contractors are removed** as users.
- ☐ **Snapshots or backups of key assets** exist before major changes.
- ☐ **Sensitive data is kept out of marketing fields** and messages, in line with your privacy obligations.

Want us to check this for you?

Our certified GoHighLevel developers will review your account against this checklist and send you a prioritised action plan within 48 hours. Free, with no obligation.

- Broken or duplicate workflows found and explained
- Speed-to-lead and pipeline gaps identified
- Email and SMS deliverability checked
- Quick wins you can implement this week

Book my free GHL audit →

Or email hello@hire-ghl-developer.com · WhatsApp [+9170160 95689](https://wa.me/917016095689)