BuildOnAuto

PRACTICAL LAUNCH SYSTEM

GoHighLevel Implementation Checklist

Plan, configure, test and measure a production account without skipping the controls that protect customers, data and deliverability.

8 phases	73 core checks	30-day scorecard

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PHASE 1

Requirements and plan selection

Define the operating requirement before configuring the platform. A tool should solve a documented workflow, not create a new collection of unused features.

Decision record

[ ]	Name the owner. One person is accountable for scope, approvals and launch.	Owner: __________
[ ]	List current systems. Record monthly cost, contract end date, data owner and whether each tool can genuinely be retired.	Owner: __________
[ ]	Define sub-account count. Use current locations or clients, not speculative future demand.	Owner: __________
[ ]	Select the smallest suitable plan. Document whether white-label desktop, SaaS mode or advanced API access is required now.	Owner: __________
[ ]	Estimate usage separately. Forecast phone, SMS, email, AI and optional add-ons using your own expected volume.	Owner: __________
[ ]	Set a first-year budget. Include implementation time, migration, training, taxes and contingency.	Owner: __________

Evidence: signed decision record, current-stack invoice list and calculator export or screenshot.

Success definition

[ ]	Choose one primary business outcome. Examples: median response time, estimate decision rate or appointment kept rate.	Owner: __________
[ ]	Freeze the denominator. Define exactly which leads, estimates, appointments or jobs qualify.	Owner: __________
[ ]	Export a baseline. Preserve at least one equal-duration pre-launch cohort before enabling automation.	Owner: __________
[ ]	Set a review date. Choose 14-day functional and 30-day outcome reviews.	Owner: __________

PHASE 2

Account, identity and access

Establish correct business identity, least-privilege access and recovery procedures before connecting customer channels.

Account foundation

[ ]	Confirm legal business name, public display name, address, timezone and business hours.	Owner: __________
[ ]	Add an owner-controlled recovery email and verify billing contacts.	Owner: __________
[ ]	Create individual user accounts; do not share one administrator login.	Owner: __________
[ ]	Grant the minimum role required for each user and contractor.	Owner: __________
[ ]	Enable available multi-factor authentication and store recovery information securely.	Owner: __________
[ ]	Document who can export contacts, edit workflows, change billing and delete data.	Owner: __________
[ ]	Create a change log with date, owner, reason, affected workflow and rollback step.	Owner: __________

Brand and customer-facing defaults

[ ]	Upload approved logo and brand colors; verify contrast on forms and emails.	Owner: __________
[ ]	Set accurate sender names, reply-to addresses and support contact information.	Owner: __________
[ ]	Review default footers, privacy links and unsubscribe behavior.	Owner: __________
[ ]	Remove test copy, placeholder domains and vendor-default claims before launch.	Owner: __________

PHASE 3

Channels and deliverability

Connect one channel at a time, verify authentication and test inbound and outbound behavior before any campaign or automation relies on it.

Email

[ ]	Use a dedicated sending domain or subdomain approved by the business owner.	Owner: __________
[ ]	Publish and verify SPF, DKIM and DMARC records appropriate to the sending setup.	Owner: __________
[ ]	Set a monitored reply-to address and a working unsubscribe route.	Owner: __________
[ ]	Send test messages to multiple mailbox providers and inspect sender identity, links and mobile rendering.	Owner: __________
[ ]	Create suppression rules for unsubscribes, bounces, complaints and invalid addresses.	Owner: __________

Phone and SMS

[ ]	Confirm number ownership, caller identity, forwarding and emergency-routing expectations.	Owner: __________
[ ]	Complete required sender registration for the countries and message types in scope.	Owner: __________
[ ]	Document consent source, permitted purpose, quiet hours and STOP handling.	Owner: __________
[ ]	Test inbound call, missed call, voicemail, inbound SMS, outbound SMS and opt-out paths.	Owner: __________

Calendar and domains

[ ]	Connect the correct user calendar and verify timezone, availability and conflict behavior.	Owner: __________
[ ]	Test booking, cancellation, rescheduling and owner notification.	Owner: __________
[ ]	Connect approved domains with HTTPS and verify forms on desktop and mobile.	Owner: __________

PHASE 4

CRM, pipeline and data

Create a minimal data model that supports routing and measurement. Every custom field should have a defined owner and purpose.

Data model

[ ]	Define pipeline stages with one entry rule and one exit rule per stage.	Owner: __________
[ ]	Create only required custom fields; record type, source, allowed values and retention purpose.	Owner: __________
[ ]	Define contact ownership and reassignment rules.	Owner: __________
[ ]	Document deduplication keys for phone, email and external identifiers.	Owner: __________
[ ]	Create tags for stable segmentation, not temporary notes or subjective judgments.	Owner: __________

Import

[ ]	Back up the source export before cleaning or mapping it.	Owner: __________
[ ]	Remove test records, obvious duplicates and contacts without a lawful business purpose.	Owner: __________
[ ]	Map a small sample first and verify phone, email, dates, owners, tags and consent fields.	Owner: __________
[ ]	Import the approved file and reconcile source count, imported count, rejected rows and duplicate merges.	Owner: __________
[ ]	Restrict and delete temporary import files after validation according to policy.	Owner: __________

PHASE 5

Core workflow build

Publish the smallest useful workflow set. Each workflow needs a trigger, actions, exit conditions, owner, KPI and manual pause control.

Workflow specification

[ ]	Missed-call acknowledgment: verify eligible call status, business hours, owner callback task and opt-out behavior.	Owner: __________
[ ]	New web-lead acknowledgment: deduplicate, assign source and owner, confirm receipt and escalate untouched leads.	Owner: __________
[ ]	Estimate follow-up: enter only from Estimate Sent, stop on reply or decision and avoid false urgency.	Owner: __________
[ ]	Appointment reminders: include accurate date, timezone and reschedule route; stop on cancellation or change.	Owner: __________
[ ]	Policy-safe review request: ask every eligible customer neutrally and never filter the public link by sentiment.	Owner: __________

Controls required for every workflow

[ ]	Name the workflow with purpose, owner and version.	Owner: __________
[ ]	Document re-entry behavior, maximum sends and wait windows.	Owner: __________
[ ]	Add exit conditions for reply, opt-out, invalid contact, stage change and manual pause where relevant.	Owner: __________
[ ]	Route exceptions to a human queue with a response-time owner.	Owner: __________
[ ]	Record the primary KPI and denominator before publishing.	Owner: __________

PHASE 6

Functional QA and compliance gate

A workflow is not ready because it saves successfully. Prove every normal path, branch, suppression and rollback behavior with controlled contacts.

Test matrix

[ ]	Create internal test contacts representing valid, duplicate, opted-out and invalid routes.	Owner: __________
[ ]	Test the normal trigger and every conditional branch.	Owner: __________
[ ]	Test reply, booking, stage-change and opt-out exits before the next scheduled message.	Owner: __________
[ ]	Test outside business hours and across the account timezone boundary.	Owner: __________
[ ]	Verify owner assignment, internal notifications and escalation timing.	Owner: __________
[ ]	Inspect message rendering, sender identity, links, personalization fallback and accessibility.	Owner: __________
[ ]	Confirm analytics events and source fields contain no unnecessary personal information.	Owner: __________
[ ]	Pause the workflow and prove that the documented rollback process works.	Owner: __________

Test ID	Contact	Trigger / branch	Expected	Actual	Pass
QA-01					[]
QA-02					[]
QA-03					[]
QA-04					[]
QA-05					[]
QA-06					[]

PHASE 7

Launch and handoff

Release in controlled stages, monitor failures and make ownership explicit before the implementation team steps away.

Launch gate

[ ]	Obtain business-owner approval for message copy, audiences, timing and outcome definitions.	Owner: __________
[ ]	Publish one workflow first and monitor a controlled cohort before enabling the next.	Owner: __________
[ ]	Verify failure queues, bounce handling, opt-outs and internal response coverage daily during launch week.	Owner: __________
[ ]	Record final workflow versions, screenshots or exports and responsible owners.	Owner: __________
[ ]	Train users on Conversations, opportunity stages, appointment status, task completion and manual pause controls.	Owner: __________
[ ]	Schedule 14-day functional and 30-day outcome reviews.	Owner: __________

Handoff pack

[ ]	Account and access register	Owner: __________
[ ]	Data dictionary and pipeline definitions	Owner: __________
[ ]	Workflow specifications and change log	Owner: __________
[ ]	Completed QA matrix and known limitations	Owner: __________
[ ]	Baseline export and measurement scorecard	Owner: __________
[ ]	Incident, rollback and vendor-support procedures	Owner: __________

PHASE 8

30-day measurement scorecard

Compare equal-duration cohorts using the same eligibility rules. Report counts and rates together, and separate system activity from revenue attribution.

Metric	Definition / denominator	Baseline	Days 1-30	Change	Notes
Median human response time	Eligible inbound leads				
Missed-call reply rate	Delivered acknowledgments				
Estimate decision rate	Estimates entering cohort				
Appointment kept rate	Confirmed appointments				
Review request coverage	Eligible completed jobs				
Published review rate	Eligible completed jobs				
Opt-out rate	Delivered marketing messages				
Workflow failure rate	Workflow enrollments				

Decision after review

[ ] Keep as configured [ ] Revise copy or timing [ ] Fix routing or data [ ] Pause workflow [ ] Expand to next cohort

Approved by: _______________________________ Date: __________________

This checklist is operational guidance, not legal advice. Confirm messaging, privacy, recording, healthcare, financial and industry-specific obligations with qualified advisors for your jurisdiction and use case.