

GoHighLevel

Zero-to-Client Checklist

A practical setup and delivery checklist for taking a local-business automation project from blank account to client-ready handoff.

Use this as an operating checklist. Exact labels and screens inside GoHighLevel can change. Confirm current platform settings as you work, especially messaging, email, domains, permissions, billing, and compliance-related configuration.

This checklist assumes you already know what service you sold. The goal here is to keep implementation organized so important setup, testing, and handoff steps do not disappear in the rush to launch.

1. Define the Client Build

- ☐ Write the exact business outcome the system is supposed to support.
- ☐ List the lead sources that will enter the system.
- ☐ Define the stages a lead should move through from new inquiry to closed or lost.
- ☐ List every automated message the client expects.
- ☐ Identify who on the client's team owns new leads and follow-up.
- ☐ Identify any calendars, phone numbers, domains, inboxes, forms, websites, or third-party tools involved.
- ☐ Define what is explicitly out of scope before configuration begins.
- ☐ Choose a target launch date and a client approval date.

Deliverable: A one-page implementation map: sources -> contacts -> pipeline -> automation -> appointment or sales outcome.

2. Create the Client Workspace

- ☐ Create or confirm the client's sub-account/location using the correct business information.
- ☐ Confirm business name, address, timezone, website, primary contact, and notification details.
- ☐ Set user access deliberately. Give each person only the access needed for their role.
- ☐ Confirm the client owns or has authorized use of every connected domain, inbox, phone number, and external account.
- ☐ Record where credentials and recovery information are stored. Do not put passwords into shared notes or unsecured documents.
- ☐ Confirm billing responsibility for any paid add-ons, phone usage, email usage, or external integrations before launch.

3. Build the Pipeline

Keep the first pipeline simple enough that the client will actually use it.

- ☐ Create the pipeline used for this service.
- ☐ Create clear stages such as New Lead, Contacted, Qualified, Appointment Set, Won, Lost, or the client's actual process.
- ☐ Define what causes a lead to enter each stage.
- ☐ Define who is responsible for moving opportunities when automation does not.
- ☐ Add only custom fields the client will genuinely use.
- ☐ Test that a new inquiry creates or updates the correct contact and opportunity record.

4. Connect Lead Capture

- ☐ Identify each form, funnel, landing page, chat widget, inbound call flow, import, or integration that creates a lead.
- ☐ Map form fields to the correct contact fields.
- ☐ Prevent obvious duplicate-contact problems where possible.
- ☐ Set source attribution so the client can distinguish where leads originated.
- ☐ Create internal notifications for the appropriate team member.
- ☐ Submit a test lead through every live entry point.
- ☐ Confirm the test lead appears in the correct contact record, pipeline, stage, and source.

5. Configure Calendar and Appointments

- ☐ Create or confirm the appropriate calendar.
- ☐ Set appointment duration, availability, buffers, timezone behavior, and assignment rules.
- ☐ Connect the correct team calendars where required.
- ☐ Confirm booking confirmation and reminder messages.
- ☐ Define what happens after a booking, cancellation, reschedule, and no-show.
- ☐ Book a real test appointment from the public booking experience.
- ☐ Confirm the appointment appears correctly for both the prospect and the assigned team member.

6. Configure Email

- ☐ Confirm the sending domain or approved sending method.
- ☐ Complete required domain authentication and verify status before relying on automated email.
- ☐ Use a recognizable sender name and monitored reply address.
- ☐ Review templates for accurate business information and realistic claims.
- ☐ Include required identification and opt-out mechanisms for commercial messaging where applicable.
- ☐ Send tests to multiple inboxes and inspect desktop and mobile rendering.
- ☐ Verify replies go somewhere the client will actually monitor.

Do not skip deliverability. A workflow can be technically correct and still fail if messages do not reach people. Domain configuration, consent, list quality, sender reputation, and message content all matter.

7. Configure SMS / Calling

- ☐ Confirm the business has the right phone configuration for the intended workflow.
- ☐ Complete any registration, verification, or campaign requirements applicable to the client's messaging use case.
- ☐ Document how the client collects consent for automated or marketing text messages.
- ☐ Make opt-out language and handling part of the workflow where required.
- ☐ Set quiet hours and sending windows appropriate to the client's audience and applicable rules.
- ☐ Test inbound and outbound messages with authorized test numbers.
- ☐ Test replies, STOP/opt-out behavior, missed-call handling, and internal notifications as applicable.
- ☐ Confirm who monitors inbound conversations after automation starts.

Compliance checkpoint: Do not treat software configuration as permission to message people. Consent, identification, opt-out handling, calling/texting rules, and industry-specific requirements can vary by jurisdiction and use case.

8. Build the Core Workflow

Build one workflow at a time. Name it so another person can understand its purpose six months from now.

- ☐ Define the exact trigger.
- ☐ Add filters so the workflow does not run on the wrong contacts.
- ☐ Set the first action and any required delay.
- ☐ Add email, SMS, task, notification, pipeline, or appointment actions in the intended sequence.
- ☐ Add exit conditions so contacts stop receiving messages when the objective is reached.
- ☐ Prevent duplicate enrollment where duplicate messaging would be harmful.
- ☐ Handle replies, bookings, opt-outs, lost opportunities, and manual intervention.
- ☐ Use internal notes or naming conventions to explain unusual logic.
- ☐ Publish or activate only after the workflow passes testing.

9. Test the Entire Customer Journey

Do not test isolated buttons only. Run a contact through the same path a real prospect will experience.

Test	Expected Result	Pass
Lead capture	Does the contact enter with correct data and source?	☐
Pipeline	Is the opportunity created in the correct stage?	☐
Assignment	Does the correct user receive the lead?	☐
Email	Does the right message arrive and render correctly?	☐
SMS	Does the right authorized test message arrive?	☐
Reply	Does a reply appear where the team expects it?	☐
Booking	Can the contact book the intended	☐

	calendar slot?	
Reminder	Do reminders fire at the expected times?	☐
Stop conditions	Does automation stop after reply, booking, opt-out, or other defined event?	☐
Notifications	Does the client receive only useful internal alerts?	☐
Mobile	Can the client understand and act on the workflow from the devices they use?	☐
Failure path	What happens if data is missing, a step fails, or a lead needs manual attention?	☐

10. Client Launch Checklist

- ☐ Client has reviewed the live customer-facing messages.
- ☐ Client has approved the pipeline stages and assignment rules.
- ☐ Client knows where new leads appear.
- ☐ Client knows how to reply to conversations.
- ☐ Client knows how to move opportunities or mark outcomes.
- ☐ Client knows how appointments appear and who owns them.
- ☐ Client knows how to pause or escalate a workflow if something is wrong.
- ☐ At least one end-to-end test has passed after final changes.
- ☐ Automations intended for launch are active.
- ☐ Old tests, temporary contacts, duplicate workflows, and draft assets are clearly labeled or removed.

11. Handoff Packet

A good handoff reduces support. Give the client a short operating guide instead of assuming they will remember the setup call.

- ☐ Login / access instructions without exposing passwords.
- ☐ Names and purpose of the active workflows.
- ☐ Pipeline stage definitions.
- ☐ Who owns each type of lead or notification.
- ☐ How to respond to conversations.
- ☐ How to handle appointments and no-shows.
- ☐ How opt-outs and unsubscribe requests are handled.
- ☐ What the client should never edit without checking first.
- ☐ How to request changes or support.
- ☐ Launch date and next review date.

12. First-Week Review

- ☐ Review new contacts and confirm source attribution.
- ☐ Inspect conversations for unexpected or duplicate messages.
- ☐ Confirm appointment notifications and reminders are functioning.
- ☐ Check workflow history for errors or contacts stuck in unintended paths.
- ☐ Review opt-outs, bounces, failed messages, and reply handling.
- ☐ Ask the client whether the team understands what to do when a lead arrives.
- ☐ Fix operational friction before adding more automation.
- ☐ Document every change made after launch.

Client Build Worksheet

Item	Details
Client / Business	
Primary Contact	
Launch Date	
Primary Outcome	
Lead Sources	
Pipeline Name	
Primary Calendar	
Assigned Users	
Email Sending Setup	
Phone / SMS Setup	
Core Workflow(s)	
Integrations	
Client Approval Date	
First Review Date	

Workflow Map

Sketch the live path before building complicated automation.

LEAD SOURCE -> CONTACT CREATED -> PIPELINE / ASSIGNMENT -> FIRST RESPONSE -> FOLLOW-UP
-> APPOINTMENT / SALE -> STOP OR NEXT STEP

Trigger:

Filters:

Immediate action:

Follow-up sequence:

Exit condition:

Manual handoff point:

Failure / exception handling:

Final Sign-Off

Ready means tested. A client build is not complete because the workflow looks correct on screen. It is complete when the intended customer journey has been tested, the client understands the operating process, and there is a clear owner for what happens after automation hands the lead to a person.

- ☐ End-to-end test passed
- ☐ Client-facing copy approved
- ☐ Client access confirmed
- ☐ Client handoff completed
- ☐ Launch date confirmed
- ☐ First review scheduled