GoHighLevel New Account Launch Checklist

Complete each phase in sequence to establish a high-deliverability, fully compliant, and automated system from Day 1.

PHASE 1 Core Account Settings & Branding

- [ ] **1. Fill Out Company Profile & Business Info**
  Why it matters: Accurate details populate automated templates, footers, and compliance tags across your account. Go to *Settings* > *Business Profile* to complete all required fields.
- [ ] **2. Configure Time Zone & Locale Settings**
  Why it matters: Misconfigured time zones cause workflow delays, calendars, and broadcast emails to send at the wrong hours. Set your local time zone under *Settings* > *Business Profile*.
- [ ] **3. Upload Logo & Brand Assets**
  Why it matters: Centralizing brand assets speeds up building funnels, emails, and client portals. Store your logo and square icon inside *Settings* > *Business Profile* and the Media Library.
- [ ] **4. Enable Required Team User Accounts**
  Why it matters: Individual logins preserve security and ensure clear audit trails for lead communications. Go to *Settings* > *My Staff* to add users and permissions.

PHASE 2 Domain, Email & SMS Setup

- [ ] **1. Connect Main Domain & Subdomains**
  Why it matters: Custom domains build trust with prospects and ensure funnels look professional. Navigate to *Settings* > *Domains* to configure your primary and subdomains.
- [ ] **2. Configure LC Email / Dedicated Sending Domain**
  Why it matters: Using a dedicated sending domain with SPF, DKIM, and DMARC prevents emails from landing in spam. Set up your domain under *Settings* > *Email Services*.
- [ ] **3. Set Up Phone & SMS Integration (LC Phone / Twilio)**
  Why it matters: SMS follow-ups require carrier registration to comply with A2P 10DLC regulations. Purchase a number and submit registration under *Settings* > *Phone Numbers*.
- [ ] **4. Integrate Payment Gateway (Stripe / PayPal)**
  Why it matters: Connecting a processor enables instant checkout on landing pages, invoices, and membership sales. Authorize accounts under *Payments* > *Integrations*.

PHASE 3 Pipelines, Calendars & Core Workflows

- [ ] **1. Build Your Sales Pipeline Stages**
  Why it matters: Clear pipelines provide immediate visual tracking for every prospect. Go to *Opportunities* > *Pipelines* to create stages (e.g., New Lead, Appointment Set, Won).

- [ ] **2. Set Up Booking Calendars & Availability**
  Why it matters: Automated calendars eliminate scheduling back-and-forth. Set availability and sync your personal calendar under *Calendars* > *Calendar Settings*.

- [ ] **3. Create Lead Capture Forms & Surveys**
  Why it matters: Forms capture prospect info across funnels and sites. Build custom forms inside *Sites* > *Forms* > *Builder*, ensuring fields map cleanly to contacts.

- [ ] **4. Build Core "Speed-to-Lead" & Reminder Workflows**
  Why it matters: Contacting leads within 5 minutes drastically boosts conversion. Set automated triggers inside *Automation* > *Workflows* for instant SMS/email replies & reminders.

PHASE 4 Final System Testing & Launch

- [ ] **1. Run a Live Opt-In & Lead Delivery Test**
  Why it matters: Testing ensures forms capture data correctly and deliver promised assets without breaking. Open your live funnel in an incognito window, submit a test email, and verify lead delivery.

- [ ] **2. Perform an Appointment Booking Test**
  Why it matters: Verifying calendar sync prevents double-booking and confirms confirmation emails send properly. Book a test call and check the automated reminder sequence.

- [ ] **3. Verify SMS & Email Deliverability**
  Why it matters: Real-world tests verify copy reads cleanly on mobile devices and inbox filters accept your domain. Check messages on both desktop and mobile devices.

- [ ] **4. Audit Pipeline Automation & Tagging**
  Why it matters: Proper tags and pipeline updates allow list segmentation for future campaigns. Open the test contact inside Contacts to ensure correct tags were applied automatically.