

GoHighLevel 7-Day Setup Checklist

Get your CRM, automations, and SMS live before you pay a dollar

FREE TRIAL
14–30 days
No credit card

Start Day 1 of your trial

Don't wait until you 'have time' — open the platform and follow this list in order.

One section per sitting

Each day, the block takes 30–90 minutes. Do one, close the laptop, and come back tomorrow.

Do Step 1 first, always

Missed Call Text Back takes 3 minutes and is the fastest way to see GHL working on real leads.

Day 1 <i>Foundation</i>	Account setup (do these before anything else) ☐ Enable Missed Call Text Back <i>Settings → Phone → toggle on. Takes 3 minutes. Immediately starts recovering missed inbound calls.</i> ☐ Register A2P 10DLC for SMS (US only) <i>Settings → Phone → Trust Centre. Takes 1–2 weeks to approve — start today so SMS works by Week 2.</i> ☐ Connect your domain <i>Settings → Domains. Links your brand URL to GHL pages and funnels.</i> ☐ Configure email sending domain <i>Settings → Email Services → add DMARC, DKIM, SPF records in your DNS. Allow 24–48 hours to propagate.</i> ☐ Name your agency workspace <i>Settings → Agency Settings → update business name, logo, and time zone.</i>
Day 2 <i>CRM & pipeline</i>	Build your contact and deal tracking system ☐ Import existing contacts <i>Contacts → Import → upload CSV. Map fields: name, phone, email, source.</i> ☐ Build your main sales pipeline <i>Opportunities → Pipelines → create pipeline with your stages (e.g. New Lead / Contacted / Quote Sent / Booked / Closed).</i> ☐ Add custom fields <i>Settings → Custom Fields → add fields relevant to your business (job type, budget, renewal date, policy type, etc.).</i> ☐ Set up contact tags <i>Tags help you segment and trigger automations. Create tags for lead source, service type, and customer status.</i>
Day 3 <i>First automation</i>	Build the one workflow that pays for itself ☐ Create a lead response workflow <i>Automations → Workflows → New Workflow. Trigger: Contact Created or Form Submitted.</i> ☐ Add SMS at 60 seconds <i>Action: Send SMS → "Hi [first name], thanks for reaching out. I'll be in touch shortly."</i> ☐ Add email at 5 minutes <i>Action: Send Email → your intro email or link to a resource relevant to their enquiry.</i> ☐ Add follow-up SMS at 2 hours <i>Action: Wait 2 hours → Send SMS → "Did you get my message? Happy to answer any questions."</i> ☐ Test the full workflow <i>Add yourself as a test contact and run through the entire sequence before activating.</i>
Day 4 <i>Calendar & booking</i>	Replace your scheduling tool ☐ Create your main calendar <i>Calendars → Create Calendar → set availability, buffer time, and booking duration.</i> ☐ Set up confirmation and reminders <i>Within calendar settings: confirmation email for booking + SMS reminders 24hrs and 1hr before the appointment.</i> ☐ Add a calendar link to your workflow <i>In Day 3's workflow, add a step: send an SMS with a booking link if the lead doesn't respond within 4 hours.</i> ☐ Embed the booking widget on your website <i>Calendars → embed code → paste into your WordPress contact page or sidebar.</i>
Day 5 <i>Lead capture</i>	Build your first funnel or lead form ☐ Choose a Snapshot (optional shortcut) <i>Sites → Snapshots → browse industry templates. Deploy one relevant to your business to skip the from-scratch setup.</i>

	☐ Build or edit a lead capture page <i>Sites → Funnels → create a landing page with a form that captures name, phone, and email as a minimum.</i>
	☐ Connect the form to the pipeline <i>In your funnel's form settings, link form submission to create a Contact and trigger your Day 3 workflow.</i>
	☐ Test end-to-end: form → CRM → SMS <i>Submit a test form, confirm the contact appears in your pipeline, and verify the automated SMS fires within 60 seconds.</i>
Day 6 <i>Reviews & retention</i>	Set up the automations that compound over time
	☐ Create a review request workflow <i>Trigger: Opportunity Stage Changed to 'Closed Won'. Action: Wait 24 hours → Send SMS asking for a Google review.</i>
	☐ Add your Google review link <i>Google Business Profile → Share review form → copy link → paste into the review request SMS.</i>
	☐ Build a past client reactivation sequence <i>Workflow triggered by a 'Past Client' tag: quarterly check-in SMS, seasonal offer email, or renewal reminder.</i>
	☐ Set up Missed Appointment follow-up <i>Trigger: Appointment No-Show tag → SMS within 15 minutes → offer to rebook.</i>
Day 7 <i>Review & commit</i>	Validate before your trial billing date
	☐ Confirm A2P SMS is approved and live <i>Check Settings → Phone → Trust Centre. If still pending, follow up with GHL support.</i>
	☐ Verify email deliverability <i>Send a test email from GHL to Gmail and check it lands in the inbox, not spam.</i>
	☐ Run through the full lead journey <i>Submit a form, confirm it hits the CRM, watch the automations fire, book an appointment, and mark it closed.</i>
	☐ Check your pipeline has real contacts <i>At least your imported contacts should be visible. Move one manually through the stages to test the pipeline behaviour.</i>
	☐ Cancel one tool you're replacing <i>Identify the first subscription GHL makes redundant and cancel it. Real proof that the consolidation is working.</i>
	☐ Decide: Starter (\$97) or Unlimited (\$297)? <i>Starter: 3 sub-accounts, your own business. Unlimited: agencies, clients, white label.</i>

READY TO START YOUR FREE TRIAL?

Get 30 days free — not the standard 14

The standard GoHighLevel trial is 14 days. This link gives you 30 — double the time to complete this checklist before you pay a dollar.

→ [Claim your 30-day free trial at gerahilan.com](https://gerahilan.com)