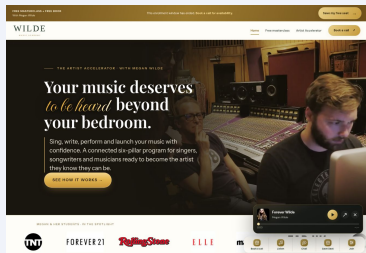


GoHighLevel account planning map

Organize the account around your actual business workflow.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 List locations, teams and the person accountable for each customer journey.
- 2 Identify the website, calendar, inbox and pipeline needed for the first workflow.
- 3 Record existing tools and decide what should stay connected rather than replaced.
- 4 Assign account ownership and verify which features your subscription includes.

EXAMPLE - ILLUSTRATIVE

A single-location studio may need one booking calendar and one enquiry pipeline before complex automation.

CHECK YOUR RESULT

Is the first workflow clearly defined before configuring the account?

GoHighLevel account planning map

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Business location:**Account owner:****Core workflow:****Tools to connect:****Required access:****DONE WHEN**

Is the first workflow clearly defined before configuring the account?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.