

# HIGHLEVEL AUDIT CHECKLIST

10 things every business owner should check | Printable self-assessment workbook

Work through each area, tick the statements that are true today, and write down what needs attention. This is a business-focused review, not a technical certification.

Business: \_\_\_\_\_ Date: \_\_\_\_\_

Completed by: \_\_\_\_\_

## 01. Are all your new enquiries being captured?

- ☐ Website forms create the correct contact records
- ☐ Notifications reach the right team member
- ☐ Enquiries enter the right pipeline when relevant
- ☐ I have tested our main enquiry routes

Notes / opportunities:

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## 02. How quickly are you following up new leads?

- ☐ New enquiries receive a prompt response
- ☐ The right person is notified or assigned
- ☐ Unanswered enquiries receive further follow-up
- ☐ Our follow-up process has a clear owner

Notes / opportunities:

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## 03. Does your sales pipeline reflect reality?

- ☐ Pipeline stages match our actual sales process
- ☐ Opportunities are updated as they progress
- ☐ Won and lost deals are recorded accurately
- ☐ Stalled opportunities are easy to identify

Notes / opportunities:

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#### 04. Are your workflows actually achieving anything?

- ☐ Important workflows have a clear business objective
- ☐ We understand their triggers and actions
- ☐ Messages stop or change when a customer buys
- ☐ We measure outcomes, not just whether they run

Notes / opportunities:

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#### 05. Is your contact database organised and useful?

- ☐ Duplicate and outdated records are managed
- ☐ Tags and custom fields are consistent
- ☐ We can distinguish prospects and customers
- ☐ We can create useful targeted Smart Lists

Notes / opportunities:

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#### 06. Are you missing opportunities for repeat business?

- ☐ Customers receive appropriate post-sale follow-up
- ☐ We have identified repeat purchase opportunities
- ☐ Renewal or service reminders are in place if relevant
- ☐ We market relevant additional services to customers

Notes / opportunities:

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#### 07. Are you asking customers for reviews and referrals?

- ☐ We ask customers for genuine reviews appropriately
- ☐ Requests go out at a sensible time
- ☐ We respond to reviews and feedback
- ☐ We have a process to encourage referrals

Notes / opportunities:

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## 08. Are you paying for software HighLevel could replace?

- ☐ We have reviewed overlapping subscriptions
- ☐ We have considered e-document signing
- ☐ We have considered events and QR ticketing
- ☐ We focus on features that offer real business value

Notes / opportunities:

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## 09. Can you see which marketing activities generate customers?

- ☐ We capture meaningful enquiry sources
- ☐ Appointments and sales are tracked
- ☐ Opportunity values are reasonably accurate
- ☐ We can connect marketing activity to revenue

Notes / opportunities:

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## 10. Does somebody in your business really understand HighLevel?

- ☐ A named CRM Champion owns the system
- ☐ They can make everyday changes confidently
- ☐ Key processes are documented
- ☐ We have a continuity plan if they leave

Notes / opportunities:

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# YOUR HIGHLEVEL ACTION PLAN

Choose the three improvements most likely to help generate enquiries, convert more sales, save time or improve customer retention.

## Priority 1

Improvement: \_\_\_\_\_

Business benefit: \_\_\_\_\_

Owner: \_\_\_\_\_ Target date: \_\_\_\_\_

## Priority 2

Improvement: \_\_\_\_\_

Business benefit: \_\_\_\_\_

Owner: \_\_\_\_\_ Target date: \_\_\_\_\_

## Priority 3

Improvement: \_\_\_\_\_

Business benefit: \_\_\_\_\_

Owner: \_\_\_\_\_ Target date: \_\_\_\_\_

## Would a second opinion help?

Book a free 30-minute HighLevel audit with Julian Mills to discuss your findings and identify practical next steps. Available even if your account is hosted by another agency.

[www.julianmills.co.uk/free-highlevel-audit](http://www.julianmills.co.uk/free-highlevel-audit)

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