GoHighLevel Agency Training
A Dynamic AI HUB training resource

# Contact Import Checklist

Prepare, tag, and verify every import.

Related week: Week 6 | Related SOP: Prepare a clean CSV | Estimated use time: 25-40 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

## Purpose

Use this checklist to clean, tag, map, and verify a contact CSV before uploading it into the CRM. Importing is a bulk action, so every mistake multiplies across the list.

## When to Use This Template

[ ] Before importing contacts from a spreadsheet

[ ] Before moving contacts from an old CRM

[ ] Before importing event, customer, or referral lists

[ ] Before applying nurture to an imported batch

[ ] When you need a rollback path after import

## Pre-Import File Review

[ ] Save original backup copy

[ ] Create cleaned working copy

[ ] Document list source

[ ] Review consent/source status

[ ] Remove empty rows and test rows

[ ] Remove rows that should not be imported

## CSV Cleanup Table

| Column | Current issue | Cleanup needed | CRM field destination | Import or skip |
|---|---|---|---|---|
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## Required Tracking

| Tracking item | Decision |
|---|---|
| List source | |
| Import batch tag/value | |
| Consent/source status | |
| Owner of import | |
| Date prepared | |
| Workflow risk reviewed by | |

## Workflow Risk Check

[ ] Contact-created workflows reviewed

[ ] Tag-added workflows reviewed

[ ] Field-updated workflows reviewed

[ ] Pipeline-stage workflows reviewed

[ ] No nurture starts automatically unless intended

[ ] SMS does not send to imported contacts without readiness review

## Post-Import Verification

[ ] Saved view or smart list created for the import batch

[ ] Sample contacts opened and checked

[ ] Name, email, phone, tags, fields, and source look correct

[ ] No unintended workflows fired

[ ] No duplicate opportunities were created

[ ] Import note is documented

## Related Training and SOPs

Related training: Week 6 - Contact Importing and Data Hygiene

Related SOPs: Prepare a clean CSV; Tag naming convention; Plan custom fields; Build a safe first workflow; Quarterly CRM audit