GoHighLevel Agency Training
A Dynamic AI HUB training resource

CRM Cleanup Checklist

Reduce sprawl without breaking active flows.

Related SOP: Quarterly CRM audit | Estimated use time: 45-75 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 reduce CRM sprawl without breaking active flows. Cleanup should be controlled, documented, and tested before anything is deleted or disabled.

When to Use This Template

[ ] When the CRM has too many tags, workflows, fields, or forms

[ ] After a quarterly audit identifies clutter

[ ] Before rebuilding a messy account

[ ] Before applying a snapshot

[ ] When the team no longer trusts reports or automation

Cleanup Inventory

Asset	Type	Problem	Dependency checked?	Action	Owner

Dependency Check

[ ] Workflow triggers checked

[ ] Smart lists checked

[ ] Forms checked

[ ] Campaigns checked

[ ] Reports checked

[ ] Snapshots or reusable templates checked

[ ] Team owners consulted

Cleanup Actions

Action	Use for	Notes
Archive	Old workflows, campaigns, forms, smart lists, test assets	
Merge	Duplicate contacts, duplicate tags, duplicate fields after review	
Rename	Unclear but active assets that need better naming	

Action	Use for	Notes
Disable	Risky or old automations that should not fire	
Rebuild	Assets too messy to safely edit	
Document	Rules, owners, source, and future review dates	

Post-Cleanup Test

[ ] Test key forms

[ ] Test key calendars

[ ] Test active workflows

[ ] Check source reporting

[ ] Check one imported/contact batch if relevant

[ ] Confirm no live links broke

[ ] Confirm team knows what changed

Related Training and SOPs

Related SOPs: Quarterly CRM audit; Prevent duplicate workflows; Tag naming convention; Plan custom fields; Snapshot basics