GoHighLevel Agency Training
A Dynamic AI HUB training resource

Quarterly CRM Audit Checklist

A repeatable review of the whole build.

Related SOP: Quarterly CRM audit | Estimated use time: 60-90 min

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

Purpose

Use this checklist every quarter to keep the CRM clean after the initial build. The audit catches drift in pipelines, tags, fields, calendars, workflows, imports, campaigns, assets, and reporting.

Audit Information

Item	Notes
Account or subaccount	
Audit date	
Reviewer	
Last audit date	
Major changes since last audit	

Quarterly Review Areas

Area	What to check	Issues found
Pipelines	Stage names, stuck opportunities, Won/Lost logic, Follow-Up Later rules	
Tags	Duplicates, naming convention, old campaign tags, dependency risk	
Custom fields	Field types, duplicates, unused fields, dropdown options	
Custom values	Phone, booking link, support email, address, footer, policy links	
Calendars	Owners, availability, buffers, reminders, external sync, booking tests	
Workflows	Duplicate triggers, stop conditions, history, wait steps, owners	
Imports/data	Batch tags, source/consent status, duplicates, missing fields	
Email campaigns	Audience, exclusions, links, bounces, complaints, replies	
Forms/assets	Form mapping, source tracking, QR links, thank-you actions	
Reporting	Source reporting, pipeline reports, bookings, useful dashboard view	

Issue Sorting

Issue	Category: archive/fix/document/rebuild	Owner	Due date	Status

Issue	Category: archive/fix/document/rebuild	Owner	Due date	Status

Closeout

[ ] Issues assigned to owners

[ ] Live-contact risks prioritized

[ ] Fixes that need testing are marked

[ ] Next quarterly audit date scheduled

[ ] Monthly mini-checks scheduled where needed

[ ] Audit note saved where team can find it

Related Training and SOPs

Related SOPs: Quarterly CRM audit; Baseline reporting view; Build a safe first workflow; Prepare a clean CSV; Tag naming convention