# GoHighLevel Upgrade Readiness Checklist

## For $97 and $297 Users
## Who Want to Scale Client Accounts

Stop guessing.
Upgrade only when it
makes financial sense.

# GoHighLevel Upgrade Readiness Checklist (2026)

If you're already using GoHighLevel, you're ahead of most people. But here's the problem…Most users upgrade too early and waste money.  Or they upgrade too late and lose leads, clients, and momentum.
This checklist makes upgrading simple.

In 5 minutes, you'll know
- whether you should stay on your current plan
- whether you should upgrade from $97 to $297
- whether Agency Unlimited is worth it for you
- what to set up immediately after upgrading

# What plan are you on?

**Step 1**

What plan are you currently on?

Tick one

☐ I'm on the $97 plan

☐ I'm on the $297 plan

☐ I'm not sure

If you're not sure, check your billing inside your HighLevel account.

**Already using GoHighLevel?**

**View upgrade options here**

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# Quick rule of thumb (no fluff)

If you're on the $97 plan

This plan is fine if you're

- learning GoHighLevel
- managing your own business only
- building your first automations
- not running multiple client accounts

But you'll hit limits quickly once you start selling automation services.

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**If you're on the $297 plan**

This plan is fine if you're

- managing a few clients
- building systems for your own business
- offering automation services as a VA or freelancer

Most people can stay on this plan longer than they think.

**Agency Unlimited is only worth it if**

- you're scaling client accounts seriously
- you want to run multiple sub-accounts cleanly
- you want to build a real automation business

# Upgrade Scorecard (tick YES or NO)

## Tick YES if true

☐ I manage multiple client accounts

☐ I 'm onboarding 2+ new clients in the next 60 days

☐ I offer automation services as a paid package

☐ I'm losing time because my setup feels messy

☐ I need separate pipelines per client

☐ I need better client onboarding systems

☐ I want to scale recurring retainers

☐ I want to build a repeatable service offer

☐ I'm using GoHighLevel daily (not occasionally)

☐ I feel limited by my current plan

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# Your Score Results

Count your YES answers.

**0–2 NO**
You don't need to upgrade yet.
Focus on building your first workflows and mastering the platform.

**3–5 YES**
You're approaching the upgrade point.
If you're on $97, moving to $297 is usually smart.

**6–8 YES**
You should upgrade soon.
Your current plan is likely slowing down growth.

**9–10 YES**
Upgrade immediately.
You're operating like a serious user and you're leaving money on the table.

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# If you're on the $97 plan... here's when you should upgrade

Upgrade from $97 if

☐ You want to sell automation packages

☐ You want to manage multiple businesses

☐ You need pipelines + automation + follow-up running properly

☐ You want to look premium to clients

☐ You want to build a scalable VA offer

Simple truth

The $97 plan is great for learning.

But if you want to earn real money with GoHighLevel, $297 is usually the next move.

**See upgrade options here**

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# If you're on the $297 plan

here's when you should upgrade

Most people on $297 do NOT need Agency Unlimited right away.

Upgrade only if
☐ You're onboarding clients consistently
☐ You want multiple client accounts organised properly
☐ You want to scale into a real systems business
☐ You want to build repeatable templates and processes
☐ You want to grow into a SaaS-style model
Simple truth:
If you're earning £2,000+ per month from automation retainers, upgrading becomes easy to justify.

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# 3 mistakes people make when upgrading

**Mistake #1:**
Upgrading before they have an offer
Upgrading won't magically create income.
Your offer creates income.

**Mistake #2:**
Upgrading without an account structure
If your account is messy now, it will be
messier after you scale.

**Mistake #3:**
Upgrading but not using the features
Some people upgrade then keep using
GoHighLevel like a basic CRM.
That's like buying a Ferrari to drive to Tesco.

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# What to build first after upgrading (24-hour checklist)

If you upgrade, don't waste the momentum. Set these up immediately:

☐ Create a clean pipeline template
 ☐ Build a missed-call text-back workflow
 ☐ Build an instant lead follow-up workflow (SMS + email)
 ☐ Set up booking calendar + reminders
 ☐ Create onboarding forms (name, email, service type)
 ☐ Set up tags for lead tracking
 ☐ Create a folder structure for client assets
 ☐ Create a basic dashboard/report view
These are the systems clients pay for.

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# The Upgrade ROI Test (simple math)

Ask yourself
How many clients do you need for the upgrade to pay for itself?

Example
If you charge £500/month per client
Then just 1 client covers most upgrades.

If you charge £1,000/month per client
Then upgrading becomes a no-brainer.

The truth
If upgrading helps you onboard even one extra client, it pays for itself.

# Who should NOT upgrade yet

**Don't upgrade if**

☐ You don't have clients yet

☐ You haven't built your first workflow

☐ You're still learning the basics

☐ You don't know what service you're selling

☐ You don't plan to manage multiple accounts Instead, focus on mastering the core system first.

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# The final decision (simple)

If you're on $97
Upgrade when you're ready to start selling automation services seriously.

If you're on $297
Upgrade only when you're scaling client accounts and recurring retainers.

If you want a premium VA business
The upgrade should support your offer, not replace it.

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# Ready to upgrade?

If you're already using GoHighLevel and scaling client accounts, upgrading is often the next logical step.

**See upgrade options here**

# Bonus Tip

If you're a VA or freelancer, the fastest way to justify upgrading is simple:
Sell one automation setup package.
 Then convert that client into a monthly retainer.

That's how premium Automation VAs scale.

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