

FREE CHECKLIST

White-Label CRM Launch Checklist

Ten steps to launch your own branded CRM for local businesses: pick a niche, price your plans, brand the software, onboard and bill clients, support them, and sign your first ten.

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How to use this checklist

Reselling a white-label CRM means you sell software under your own brand, on a platform you pay for wholesale. The software is the easy part. The work is choosing who you serve, packaging the offer, and running the business around it. This checklist walks through that work in order.

Tick each box as you finish it. Each step ends with a link to a longer guide on ResellerCRM.com if you want the detail. The roadmap below is a sample pace; go faster or slower to suit your schedule.

Week	Steps	Done when
Week 1	1. Niche · 2. Pricing · 3. Platform	You have one niche, two or three priced tiers and a platform trial running.
Week 2	4. Branding · 5. Master template	Your app loads on your own domain and a test account works end to end.
Week 3	6. Onboarding · 7. Billing · 8. Support	A test client can pay, get an account, log in and reach you for help.
Week 4	9. Marketing · 10. First clients	Your offer page is live and you have booked your first demos.

Before you start

- ☐ A registered business and a business bank account, so client payments do not mix with personal money.
- ☐ A payment processor account (most white-label platforms bill through Stripe or a similar provider).
- ☐ A domain name for your brand, or a shortlist to register in Step 4.
- ☐ A rough budget for the platform subscription for at least three months, before client revenue covers it.
- ☐ A few hours a week for outreach. Software does not sell itself, even good software.

About the links in this checklist. Some links to HighLevel are paid (affiliate) links, marked "paid link". If you buy a plan through one, ResellerCRM may earn a commission at no extra cost to you. HighLevel prices quoted here were checked on HighLevel's own pricing page on October 29, 2026. Vendors change prices; confirm on their site before you buy. Worked examples are illustrations of the arithmetic, not forecasts or promises of income.

STEP 1

Pick one niche

One niche means one master template, one sales pitch, one set of integrations and referrals that travel between owners who know each other. "Local businesses" is not a niche; "independent dental practices in Arizona" is.

- ☐ List three to five industries where you already have contacts, experience or past clients.
- ☐ For each, write the main problem a CRM fixes there: missed calls, slow replies to new leads, appointment no-shows, too few reviews, no follow-up on old quotes.
- ☐ Check that these businesses already pay for software or marketing (booking tools, websites, ads). Buyers who already pay are easier to convert than first-time buyers.
- ☐ Confirm that one new customer is worth enough to them that a monthly subscription is an easy decision.
- ☐ Check that you can reach at least 100 of them: directories, associations, local groups, LinkedIn, your own network.
- ☐ Score your options in the table below and pick the highest total.
- ☐ Write your positioning in one sentence: "[Brand] helps [niche] [get result] without [pain]."

Score each 1 (weak) to 5 (strong)	Niche A: _____	Niche B: _____	Niche C: _____
I understand how this industry gets and keeps customers			
They already pay for software or marketing			
A new customer is worth a lot to them			
I can reach 100 of them in the next 60 days			
A ready-made industry template exists or is easy to build			
They talk to each other (associations, events, groups)			
Total			

YOUR POSITIONING SENTENCE

_____ helps _____ without _____.

Tip: HighLevel's pricing FAQ mentions a snapshot library of pre-built accounts for industries such as real estate, dentists and gyms. A niche with a ready template shortens Step 5. Deeper dive: resellercrm.com/guides/white-label-crm-for-niches/

STEP 2

Set pricing tiers and check the margin

Price on the value of the outcome to the client, not on what the platform costs you. Two or three tiers are plenty at launch; more choices slow buyers down.

- ☐ Choose two or three tiers. A common pattern: software only, software plus setup, software plus ongoing service.
- ☐ Decide what each tier includes: number of users, phone number, included text and email usage, setup work, support level.
- ☐ Decide how phone, text and email usage is billed: an included allowance, passed through at cost, or rebilled with a markup.
- ☐ Decide on a setup fee, an annual discount and whether you offer a free trial, a paid trial or neither.
- ☐ Write a simple cancellation policy (notice period, what happens to the client's data).

Tier (example)	Who it is for	What is included	Your price
Starter Software only	Owners who like to do it themselves	Branded CRM, booking calendar, two-way inbox, review requests, help docs	\$_____ /mo
Growth Software + setup	Most clients	Starter, plus done-for-you setup, contact import and a monthly check-in	\$_____ /mo + setup \$_____
Pro Software + service	Busy owners	Growth, plus campaigns you run for them and priority support	\$_____ /mo

Worked example: the arithmetic, not a forecast

Platform cost: HighLevel's \$497/month plan, the tier that includes SaaS Mode (see Step 3). Suppose you charge clients **\$197/month**. That price is only an example; set your own.

- **Break-even:** $\$497 \div \$197 = 2.5$, so the third paying client covers the platform fee.
- **At 10 clients:** $10 \times \$197 = \$1,970$ per month, minus $\$497 = \$1,473$ per month before usage you do not rebill, payment processing fees, other tools and your own time.
- **Annual billing:** the same plan is $\$4,970$ per year, about $\$414$ per month.

Prices from gohighlevel.com/pricing, checked October 29, 2026. Your results depend on your pricing, sales and costs.

Your monthly margin worksheet	
Paying clients × average monthly price	\$
Minus platform subscription	– \$
Minus other tools (email domain, scheduling, design, etc.)	– \$
Minus payment processing fees (check your processor's pricing page)	– \$
Minus usage costs you absorb instead of rebilling	– \$
Minus support and setup time (hours × your hourly rate)	– \$
Monthly margin	= \$

Try different numbers in the free calculator: resellercrm.com/profit-calculator/ · Pricing guide: resellercrm.com/guides/how-to-price-white-label-crm/

STEP 3

Choose the platform

Write your requirements down before you look at sales pages. A reseller needs different things than a business buying a CRM for itself.

- ☐ Clients see your brand: your domain, logo and colors, not the vendor's.
- ☐ A client account is created automatically when someone pays, with your template already loaded.
- ☐ Recurring billing is built in, including what happens when a card fails.
- ☐ You can pass phone, text and email usage on to clients, ideally with your own markup.
- ☐ Industry templates can be copied into each new client account.
- ☐ Month-to-month terms, so you are not locked into a contract before you have clients.
- ☐ A free trial long enough to build your setup before you pay.

Our top pick for a SaaS launch: HighLevel SaaS Mode

HighLevel describes SaaS Mode as turning the platform into your own sellable software: subscriptions are sold from your website, client accounts and users are created automatically, unpaid accounts can be locked (dunning), and phone and email usage can be rebilled. That covers the requirements above in one product. Facts from HighLevel's pricing page and FAQ, checked October 29, 2026:

Plan	Price	Sub-accounts	For a white-label SaaS launch
Starter	\$97/mo or \$970/yr	3	Learning the platform; no SaaS Mode
Unlimited	\$297/mo or \$2,970/yr	Unlimited	Agency services; rebills phone and email with no markup
\$497 plan	\$497/mo or \$4,970/yr	Unlimited	SaaS Mode plus rebilling with markup. HighLevel's FAQ calls it the Pro plan; its pricing page currently labels this tier "Founder".

- 14-day free trial on any plan; unlimited contacts and unlimited users on all plans.
- Month-to-month with no long-term contract; upgrade, downgrade or cancel from the dashboard.
- White-label the desktop web app and connect custom domains, so clients see your logo when they log in.
- Usage-based charges apply for phone numbers, texts, emails sent and some premium features. Billing starts automatically when the trial ends unless you cancel, and usage fees can apply during the trial.

Start the 14-day HighLevel SaaS trial

Build your branded setup, template and pricing page during the trial, before your first payment.

[Start the SaaS Mode trial](#) or [compare all HighLevel plans](#)

Paid links: if you buy a HighLevel plan through them, ResellerCRM may earn a commission at no extra cost to you. ResellerCRM is independent and is not affiliated with or endorsed by HighLevel LLC.

Want to compare first? Our comparison weighs HighLevel against Vendasta, SuiteDash, Simvoly and DashClicks: resellercrm.com/best-white-label-crm/

STEP 4

Brand the software and set up your domain

Clients should meet your brand at every touchpoint: the login page, emails, texts, invoices and help docs.

- ☐ Pick a brand name that does not include the vendor's name. Search the USPTO trademark database and check the .com is available.
- ☐ Register the domain and set up a business email address on it (support@ and billing@ help later).
- ☐ Create a logo in square and horizontal versions, pick two brand colors and make a favicon.
- ☐ Point an app subdomain such as app.yourbrand.com at the platform. On HighLevel this is a CNAME record plus the white-label settings in your agency account; its help center walks through it, and SSL is issued automatically.
- ☐ Add your own privacy policy and terms of service links to the login page.
- ☐ Set up a dedicated email sending domain with SPF, DKIM and DMARC records so client emails reach the inbox.
- ☐ Decide whether you need a branded mobile app now. HighLevel lists a white-label mobile app add-on at \$497/month; most launches can wait until clients ask for it.
- ☐ Brand your invoices, receipts and notification emails with your name and support address.
- ☐ Log in as a test client and look for any page that still shows the vendor's name.

Step-by-step rebrand guide: resellercrm.com/guides/rebrand-highlevel-custom-domain-app/

STEP 5

Build your master template

Build one complete account for your niche, then copy it into every new client account. On HighLevel these templates are called snapshots. A good template is most of what clients pay for.

- ☐ Start from an industry template if one fits, or build one master account from scratch.
- ☐ Pipeline stages that match how the niche sells, for example: New lead, Contacted, Booked, Showed, Won, Lost.
- ☐ A booking calendar with confirmation and reminder messages.
- ☐ Lead capture forms and a simple landing page the client can use on day one.
- ☐ Core automations: instant reply to new leads, missed-call text-back, appointment reminders, review request after a visit, and a re-engagement message for old leads.
- ☐ Email and text templates that use placeholders for the business name, address and phone.
- ☐ Custom fields for business details, so you fill them in once per client.
- ☐ A dashboard showing the three numbers the owner cares about most (for example: new leads, booked appointments, new reviews).
- ☐ Run a test contact through every automation and fix anything that misfires. Record the template version and date.

STEP 6

Plan client onboarding

The first week decides whether a client stays. Clients who see a result early, such as a lead answered automatically, are far easier to keep than clients left to figure it out.

When	What happens	Done
Day 0	Welcome email: login link on your domain, what happens next, how to reach support, link to book the kickoff call.	
Day 1	Kickoff call (30 to 45 minutes): goals, where leads come from today, who on their team will use the system.	
Day 1-2	Collect assets: logo, hours, services, team list, contact export, domain and Google Business Profile access.	
Day 2-4	Load the template, import contacts, set up the calendar, connect the phone number and start US texting registration (A2P 10DLC) early, since approval takes time.	
Day 5	Training: one 20-minute screen share plus short how-to videos they can rewatch.	
Day 7	Check-in: are new leads getting replies? Are bookings showing up? Fix gaps now.	
Day 30	First monthly report and a short review call.	

Onboarding form: what to ask for

- ☐ Business name, address, phone, website and hours
- ☐ Services, prices (if public) and booking rules
- ☐ Team members who need logins, with roles
- ☐ Current contact list (CSV) and where leads come from
- ☐ Logo files and brand colors
- ☐ Access to domain DNS and Google Business Profile

STEP 7

Set up billing

- ☐ Connect your payment processor. HighLevel's SaaS Mode guide starts with connecting Stripe to your agency account.
- ☐ Build each plan in the SaaS configurator: monthly and annual price, features, the template it loads, trial length, included usage credits and rebilling markup.
- ☐ Add the plans to a pricing and sign-up page with an order form, so a client can buy without a call.
- ☐ Decide your trial approach: free trial, paid first month or setup fee.
- ☐ Turn on failed-payment handling: automatic retries, reminder emails and account lockout after a set period.
- ☐ Spell out usage rebilling in your terms so no client is surprised by a text or call charge.
- ☐ Ask an accountant whether software subscriptions are taxable where you and your clients are.
- ☐ Use a written client agreement: services, monthly term, cancellation notice and data export on cancellation.
- ☐ Make one real test purchase with your own card, check the account was created, then refund it.

STEP 8

Set up support

You are the software company now. Clients contact you, not the vendor, so decide how support works before the first client arrives.

- ☐ Choose channels by tier: email and in-app chat for everyone, phone for the top tier only.
- ☐ Publish response times by tier (for example, same business day for Pro, next business day for Starter) and keep them.
- ☐ Write or record ten short help articles under your brand: logging in, resetting a password, the inbox, the calendar, adding a team member, reading reports.
- ☐ Save replies for your ten most common questions.
- ☐ Decide what you fix yourself and what you escalate to the platform's support team, and how you keep the client updated while you wait.
- ☐ Send a monthly report: leads, booked appointments, reviews and one recommendation.
- ☐ Log every ticket. Repeated questions point to a gap in your template or training.
- ☐ Watch for warning signs of cancellation: logins dropping, unanswered leads, missed check-ins.

More on keeping clients: resellercrm.com/guides/reduce-saas-churn/

STEP 9

Market the offer

- ☐ A one-page offer: the problem, what is included, your price (or "from" price), a short demo video and a button to book a call.
- ☐ A three-minute demo video recorded in a demo account filled with sample data, never a real client's.
- ☐ A list of 100 businesses in your niche with the owner's name and one personal detail for each opening line.
- ☐ Warm outreach first: past clients, your network, local associations and chambers of commerce.
- ☐ Partners who serve the same owners: web designers, accountants, consultants, equipment suppliers.
- ☐ Niche content: short posts or videos that answer the questions owners in your niche ask.
- ☐ A referral offer for clients who introduce another business.
- ☐ Follow the rules: cold email must include your real postal address and an opt-out (CAN-SPAM), and check Do Not Call and texting consent rules before any cold call or text. Never text a purchased list.
- ☐ Collect real results from your first clients, with permission, to use as case studies. Never publish numbers you cannot show.

Client-finding guide: resellercrm.com/guides/find-first-saas-clients/ · Reselling step by step: resellercrm.com/guides/how-to-resell-a-crm/

STEP 10

Sign your first 10 clients

Your first ten clients are your product research. Treat them as founding clients: give them close attention, ask for honest feedback, and use what you learn to fix the template and the offer.

- ☐ Offer founding-client pricing for the first ten, with a clear end date and in writing.
- ☐ Book demos, not "quick chats". Show their niche's template working on a real scenario.
- ☐ After every demo, send a short recap with the price, what happens next and a sign-up link.
- ☐ Onboard each client with the Step 6 plan; do not skip the day 7 check-in.
- ☐ At day 30, ask: what would make you sorry to lose this? Use the answer in your marketing.
- ☐ Ask happy clients for a referral and, with permission, a short case study.

#	Business	Source	Demo date	Plan	Start date	Onboarded	Day 30 check-in
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

Pipeline math to plan your outreach. Write down your own numbers as you go: businesses contacted ____, replies ____, demos booked ____, clients signed _____. After the first 30 days, divide each number by the one before it to see where prospects drop off, and fix that step first.

FINAL CHECK

Launch-day checklist

- ☐ Your app loads on your own domain with your logo, and the login page links to your privacy policy and terms.
- ☐ A test purchase on your pricing page creates a client account with your template loaded.
- ☐ Failed-payment handling and reminder emails are switched on.
- ☐ Every automation in the template has been tested with a dummy contact.
- ☐ Your sending domain passes SPF, DKIM and DMARC checks.
- ☐ Help articles and saved replies are ready; support hours and response times are published.
- ☐ Your client agreement and cancellation policy are written and linked from the sign-up page.
- ☐ Your offer page and demo video are live, and your list of 100 prospects is ready.
- ☐ You know your break-even client count and your monthly margin at 10 clients.
- ☐ Your first five outreach messages are scheduled for this week.

Free resources on ResellerCRM.com

- Best white-label CRM comparison: resellercrm.com/best-white-label-crm/
- Profit calculator: resellercrm.com/profit-calculator/
- HighLevel SaaS Mode pricing explained: resellercrm.com/guides/highlevel-saas-mode-pricing/
- Start a SaaS agency with HighLevel: resellercrm.com/guides/start-saas-agency-highlevel/
- All guides: resellercrm.com/guides/

Ready to build? Start with the 14-day trial

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