


Platform Selection: Essential Criteria Checklist

Not all white-label platforms are equal. Focus on fundamentals that preserve margin and operational control:

<https://ghl-services-playbooks-automation-crm-marketing.ghost.io/why-every-marketing-agency-needs-a-white-label-solution-in-2026/>

Core Infrastructure:

- ☐ Unified CRM with visual pipeline management and funnel reports
- ☐ Two-way SMS with conversation history
- ☐ Multi-channel inbox (SMS, Facebook, Instagram, WhatsApp, Google Chat)
- ☐ Email marketing with deliverability monitoring
- ☐ Appointment scheduling with calendar sync and timezone support
- ☐ Landing page and funnel builder (no-code drag-and-drop)
- ☐ Form builder with conditional logic
- ☐ Workflow automation with multi-step conditional branching
- ☐ Payment processing built-in (Stripe, PayPal)
- ☐ Membership site and course hosting capabilities
- ☐ E-commerce functionality (product catalogs, inventory, shipping)

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AI & Automation:

- ☐ Voice AI agents for inbound call handling
- ☐ Speech recognition with natural language understanding
- ☐ Multi-language support (ask for language count and voice options)
- ☐ Conversation AI for text-based chat automation
- ☐ Reviews AI with automated request and response generation
- ☐ Content AI for marketing copy generation
- ☐ AI usage rebilling (can you mark up AI consumption?)
- ☐ Web-based voice chat widget (WebRTC)

Social & Lead Capture:

- ☐ Native Facebook Lead Forms integration (no Zapier)
- ☐ Native TikTok Lead Forms integration
- ☐ Direct social messaging (Facebook, Instagram DM)
- ☐ WhatsApp business integration

- ☐ Google Business Chat integration

Integration Ecosystem:

- ☐ Native integrations (Stripe, Zoom, Google, Facebook, TikTok)
- ☐ Webhook support (send and receive)
- ☐ Public REST API with comprehensive documentation
- ☐ Zapier/Make compatibility (5000+ apps)
- ☐ API rate limits that support scale

Agency Operations:

- ☐ Multi-client management from single dashboard
- ☐ Unlimited sub-accounts (or clear scaling path)
- ☐ SaaS mode for automated client provisioning
- ☐ White-label branding including custom URLs and login pages
- ☐ White-label mobile app (iOS and Android) - typically additional monthly fee
- ☐ Client sub-accounts with granular permission controls
- ☐ Snapshot/template system for one-click client setup
- ☐ Unified reporting across all channels and sub-accounts
- ☐ Clear data ownership and export policies

Business Model:

- ☐ Pricing preserves 40-60% agency margin
- ☐ Markup/rebilling on SMS, email, and AI usage
- ☐ Transparent overage billing (no surprise spikes)
- ☐ No per-user fees (flat monthly with unlimited users)
- ☐ No per-contact pricing (unlimited contacts)
- ☐ Reliable uptime SLA (99%+ documented)
- ☐ Regular feature updates without cost increases

Red Flags to Avoid:

- Platforms requiring custom development for basic workflows
- Per-user or per-contact pricing that erodes margins at scale
- Limited white-label customization (visible vendor branding)
- Poor multi-client management (separate logins per client)
- Vendor lock-in with restrictive data export or migration fees
- No native social integrations (forces Zapier dependency)
- AI capabilities that can't be rebilled to clients
- Mobile app that can't be white-labeled

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