

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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