CLIENT

Fresh Start Health Retreat Centers Ltd.

Campbell River, BC, Canada · HealthRetreat.ca

CASE STUDY 02 · CRM MIGRATION · KEAP API · GOHIGHLEVEL API · PYTHON

Keap to GoHighLevel. 19 years of data, moved.

Fresh Start, a Canadian health restoration retreat, ran its CRM on Keap since 2012, with guest history back to 2007. In four weeks, while they kept taking registrations and payments, I cleaned 8,000+ contacts, moved 19 years of history record by record, and rebuilt their daily operations in GoHighLevel.

- 8,000+ contacts cleaned
- 45,750 API calls, 0 rate limits
- 12 registration workflows
- DKIM 100% at Google

By. Razi ur Rehman

19 years of data, and still trading.

Keap held 8,000+ contacts, many of them duplicates and dead entries, plus 19 years of invoices, tasks, notes and appointments. The job: clean the list, move everything that mattered, and rebuild daily operations in GoHighLevel so Keap could be switched off.

8,000+
contacts cleaned

3,723
invoices in history

4,380
tasks and notes

194
custom fields

SOURCE

Keap Classic, 2012 to 2026

Exports plus the Keap REST and XML-RPC APIs.

ENGINE

Python scripts, reconciled

Checked field map, safe re-runs, a log line for every call.

DESTINATION

GoHighLevel, one source of truth

Contacts, history, workflows, email, invoicing.

Razi ur Rehman

One migration. Nine workstreams.

01 · HISTORY

Every record moved

Invoices, tasks, appointments and notes, per contact.

02 · DATA MODEL

Field map checked live

Keap-only data kept in its own folder.

03 · REGISTRATION

12 workflows, 90 tags

One tag fills 14 registration fields.

04 · LEAD INTAKE

15 forms, one intake

Clean data, owner assigned, priced opportunity.

05 · EMAIL

71 templates, 48 snippets

Rebuilt to the brand. 70 old ones archived.

06 · LANDING PAGES

Two funnels rebuilt

Now editable by the team in GoHighLevel.

07 · DELIVERABILITY

DKIM and DMARC fixed

100% DKIM pass at Google within 48 hours.

08 · TRACKING

Google Ads leads tracked

Found the gap and wrote the UTM fix.

09 · HANDOVER

Documented, then retained

5.0 review on Upwork, direct work since.

Extract, archive, clean, load, reconcile.

Keap data kept changing during the move, so everything was pulled first, archived raw, cleaned, then proven against source counts.

1 · EXTRACT
Pull all
Export and API, before any cleanup.

2 · ARCHIVE
Keep raw
Every file saved first.

3 · CLEAN
Dedupe, map
8,000+ contacts cleaned.

4 · LOAD
Safe re-runs
Retries, no duplicates.

5 · CHECK
Prove counts
45,750-row action log.

6 · CUTOVER
Keap off
Last changes, then off.

RULE
Draft first
Nothing went live before the owner approved it.

RULE
Deviations in writing
Any change from the spec was explained the same day.

RULE
Their way of working
Their task tracker, their chat, their notice periods.

Razi ur Rehman

One run. Every contact accounted for.

- 6,561 contacts in one pass
- 0 rate limits in 45,750 API calls
- 25 brief errors, all recovered
- 49 no-matches: contacts the owner had already deleted

```
[summary] contacts processed .. 6,561
[summary] matched ............. 6,512 / 49 no-match
[summary] history notes ....... 685
[summary] appointments ........ 2,031
[summary] invoice histories ... 927
[summary] tasks created ....... 3,172
[summary] http 429 ............ 0
[summary] http 503 ............ 25, recovered
[summary] action log rows ..... 45,750
done.
```

DISCLOSED

852 tasks unassigned

Their old owners were not GoHighLevel users.

CLEANUP

1,178 duplicate notes removed

Exact matches only, 0 errors.

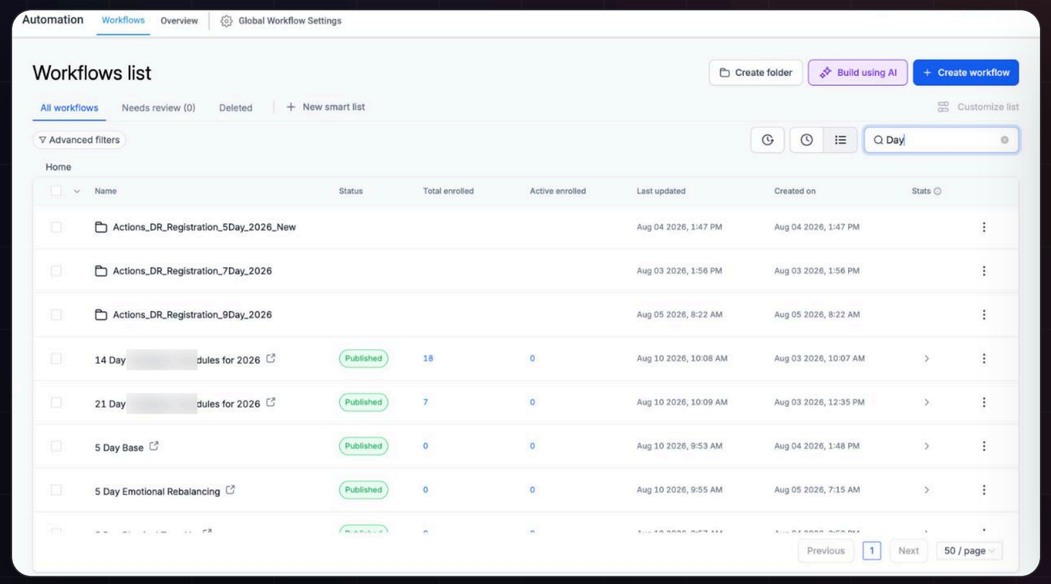
LINKS

366 linked contacts

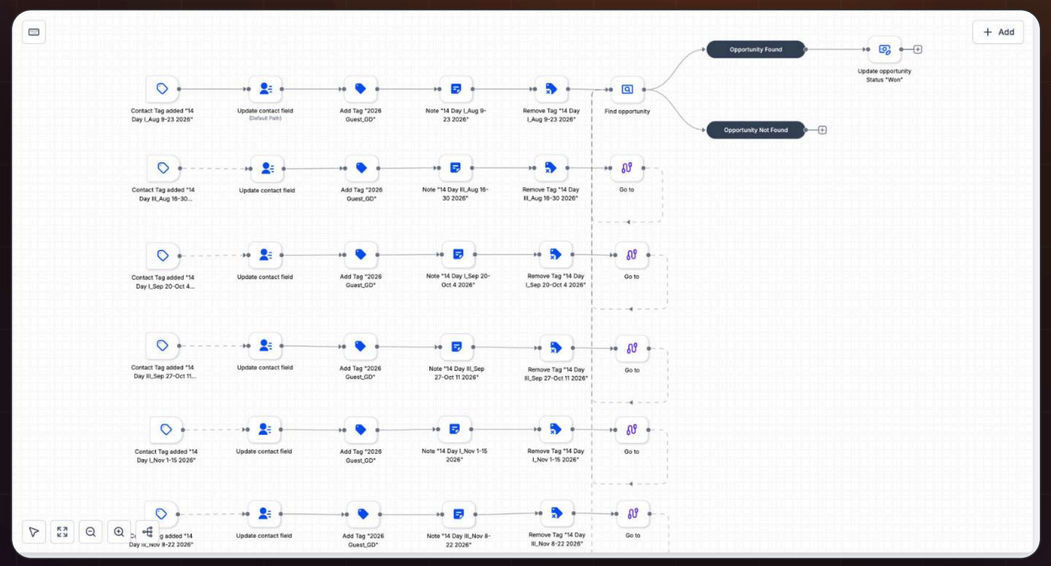
Family links delivered as a sheet.

One tag registers a guest.

Instead of typing 14 fields per guest, the consultant adds one tag. 12 workflows cover all 90 program, date and package combinations.



REGISTRATION WORKFLOWS (NAMES HIDDEN)



ONE WORKFLOW, ONE BRANCH PER SESSION

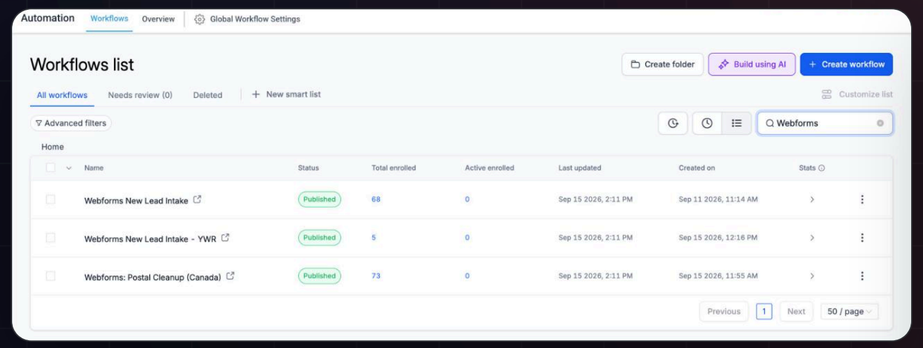
14 fields from one tag
No typing, no mismatches.

Opportunity marked Won
The pipeline matches reality.

Tested with the owner
On real registrations, day one.

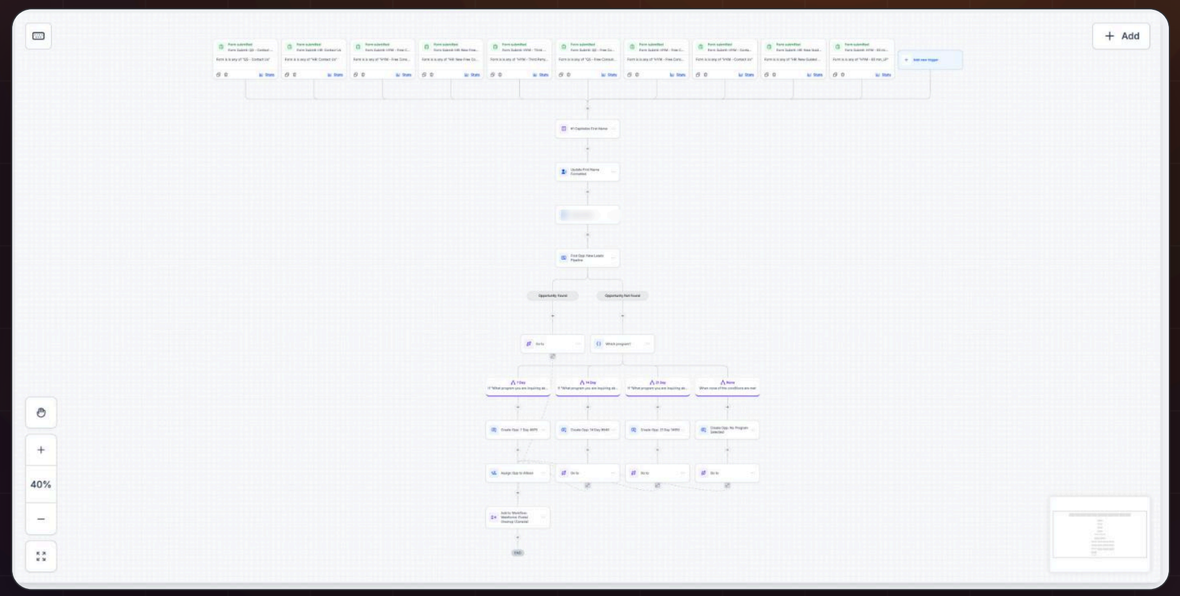
Fifteen forms, one clean intake.

Every form across four brands: tidy the name and postal code, assign the consultant, create one priced opportunity. A booked call moves the card forward.



THE INTAKE WORKFLOWS

Live-tested the night it shipped. Every check passed.



INTAKE: TRIGGERS, FORMATTING, ASSIGNMENT

Duplicate guard
One open card per lead, never two.

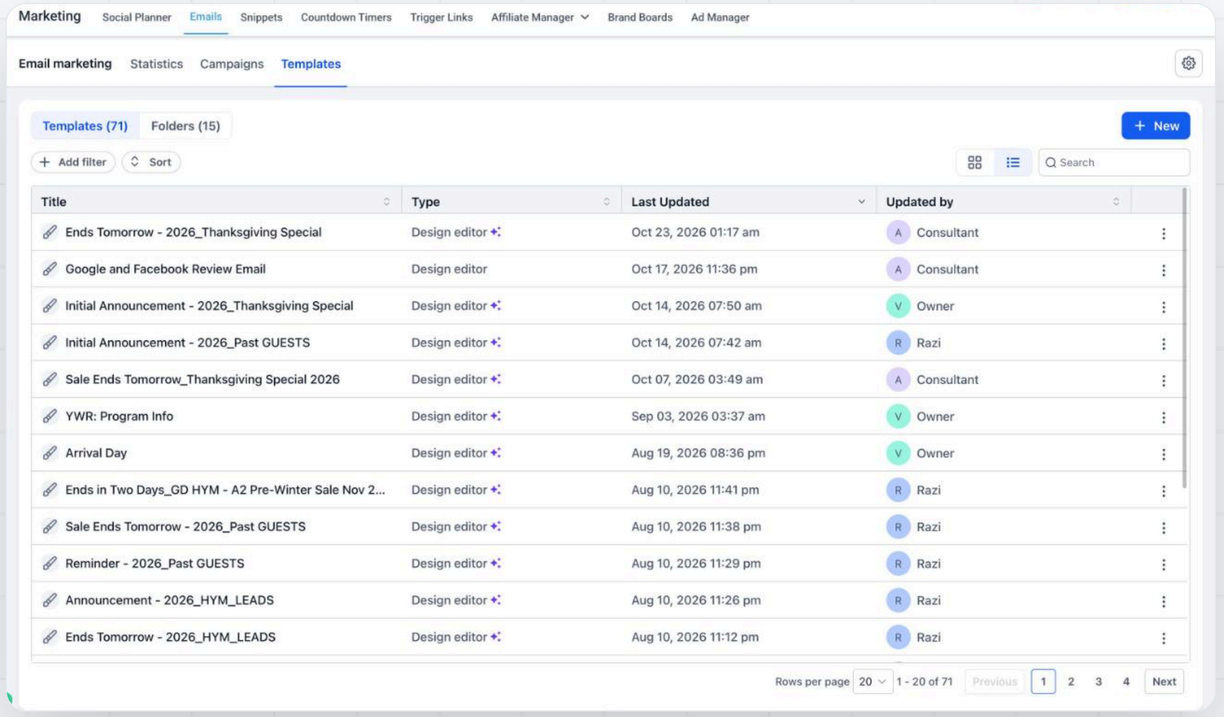
Deviations in writing
Explained and documented.

Staff bookings excluded
Only public calendars move cards.

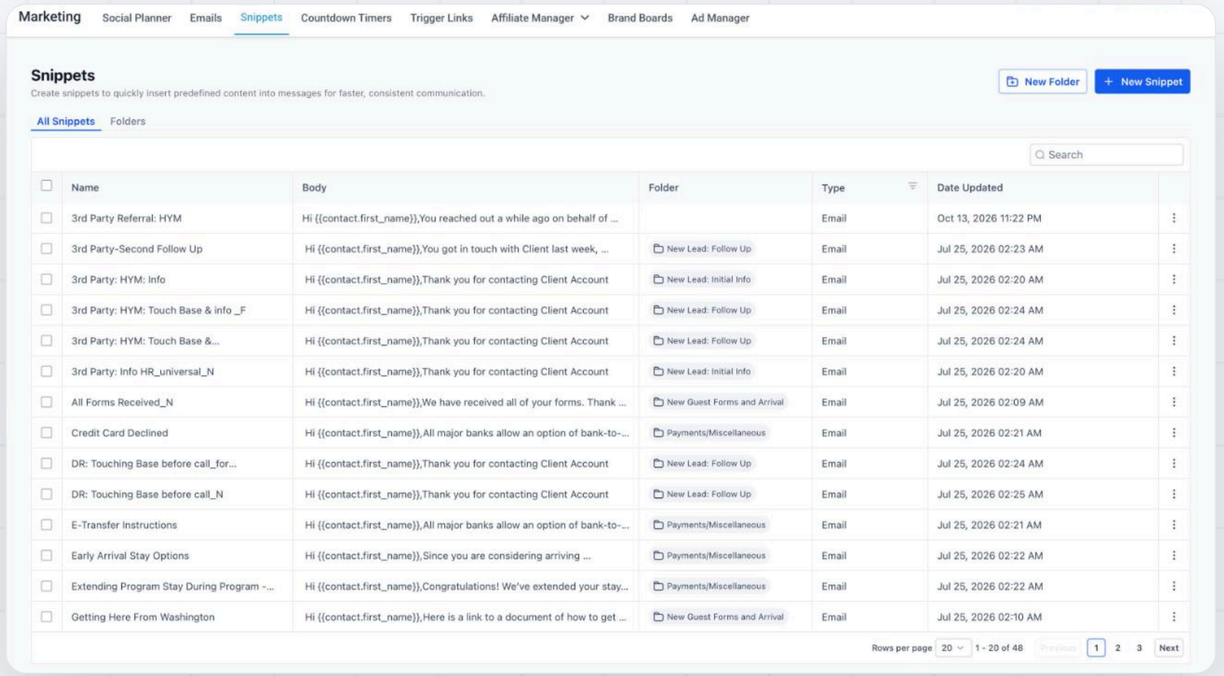
187 Keap templates, sorted.

Each one marked archive, rebuild or drop. The keepers were rebuilt to the brand, with the booking widget.

- 71 templates in 15 folders
- 48 snippets
- 70 old templates archived
- Campaigns off until approved

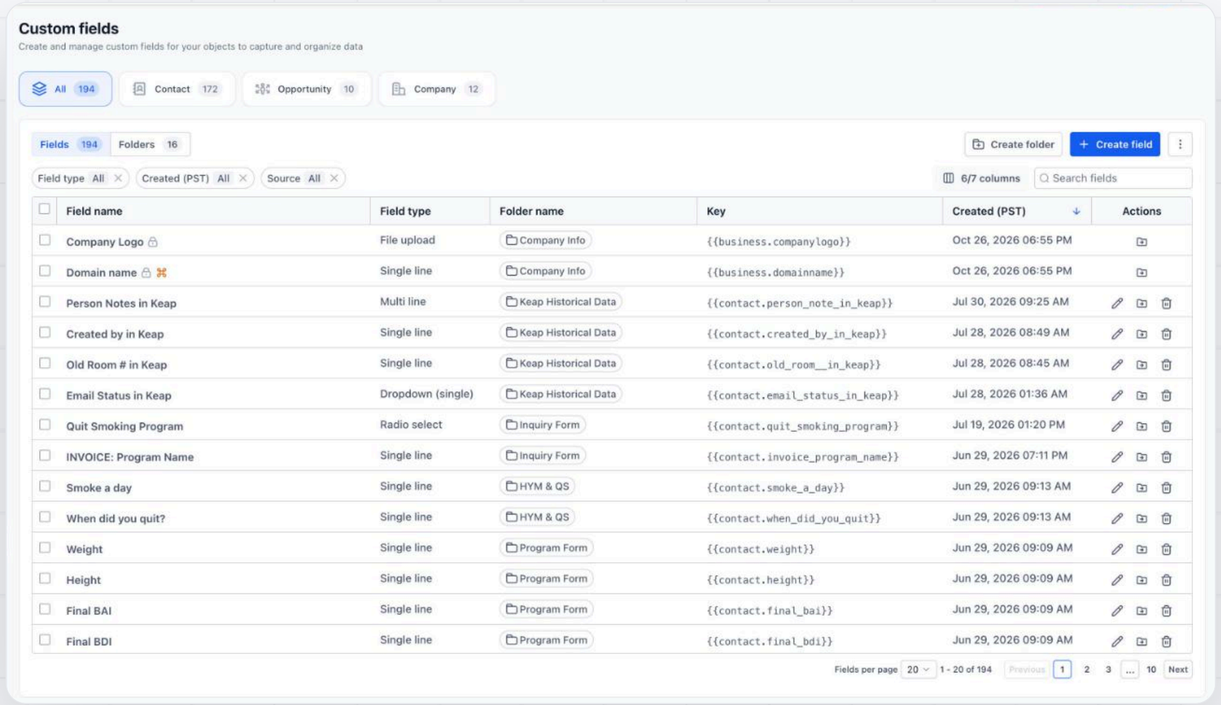


TEMPLATES (NAMES HIDDEN)



Keap history kept in its own lane.

194 custom fields in 16 folders. Keap-only fields live in their own folder, so old values never mix with live ones.



CUSTOM FIELDS: THE KEAP HISTORY FOLDER

LISTS

27 smart lists

The lists the team runs each week.

PIPELINES

2 pipelines, 14 stages

From form to booked call to won.

INTEGRATION

Portal reads GoHighLevel

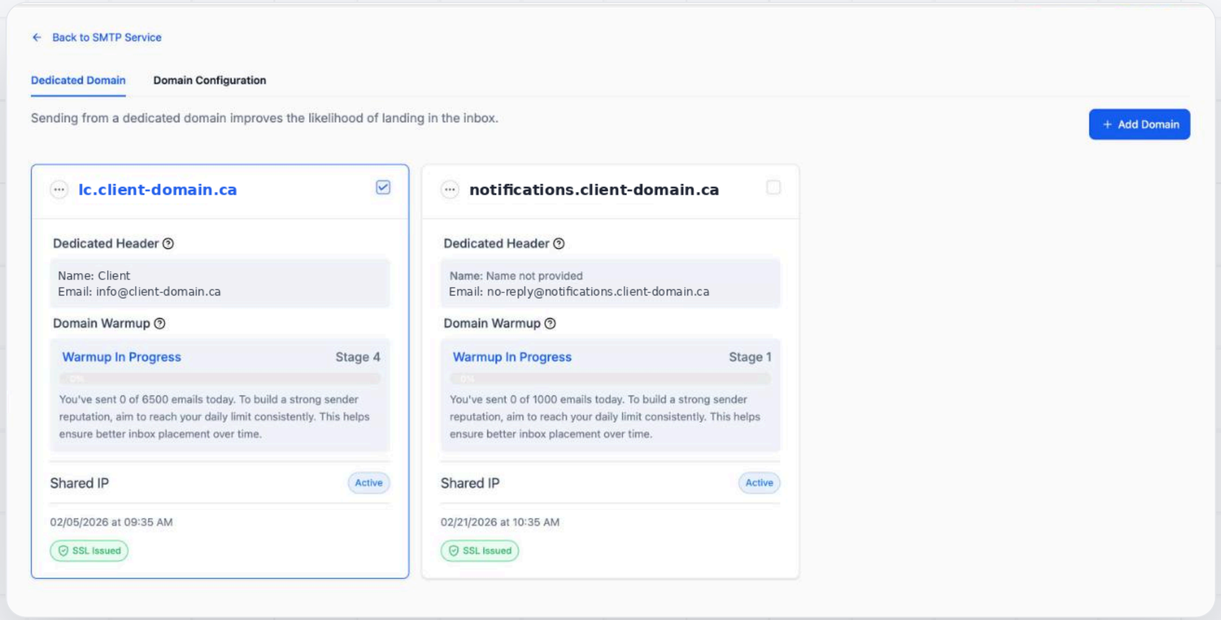
One record feeds both systems.

Two senders. Both signed.

Gmail was losing their emails. Records were incomplete and Microsoft 365 was not signing. Fixed one record at a time, after a full backup.

100%
DKIM pass

0%
spam rate



SENDING DOMAINS VERIFIED (NAMES REPLACED)

Record	Before	After
DKIM (lc)	key missing	full key
DMARC (lc)	no policy	policy set
DKIM (notify)	key missing	verified
Microsoft 365	not signing	signing
Gmail test	spam	inbox

A live business is not a sandbox.

The owner set the rules. I built inside them.

COMPLIANCE

Unsubscribe by hand

The owner’s footer, approved first.

SCOPE

Phones stay put

The phone system was not replaced.

PROCESS

Pipeline to registration

After that, tasks, not stages.

DNS

Backup, then one record

Checked after every save.

SAFETY

Nothing deleted

Old work archived, not removed.

HYGIENE

Test data cleaned

No passwords in docs or chat.

Keap off. Client kept.

Keap was switched off in August 2026 with every record accounted for. The client left a 5.0 review and a video testimonial, then hired me directly for ongoing work.

4 wks
hire to Keap off

100%
contacts accounted for

16
workflows live

5.0
Upwork review

STACK

Python + two CRM APIs

Keap REST and XML-RPC, GoHighLevel API.

EVIDENCE

Everything on file

Run report, logs, backups, specs.

NEXT

Still building for them

Nurture emails, referrals, a payments dashboard.

Razi ur Rehman

In the client's own words.



UNEDITED FRAME FROM HIS VIDEO REVIEW

> “We have very tight deadlines by August 16th and we got it done.”

> “You can count on Razi for genuineness.”

> “When he says I'll do it, basically you have someone to depend on.”

Vasili (Wes) Kastashchuk
Fresh Start Health Retreat Centers Ltd. · Campbell River, BC

5.0
Upwork review

WHAT I DO

Specializing in moves to GoHighLevel.

Moving off Keap, HubSpot, ActiveCampaign or a spreadsheet? Message me with what is in the old system. I will tell you what can move cleanly and what cannot.

GoHighLevel | Keap | Data migration | Python | n8n | Make

Razi ur Rehman