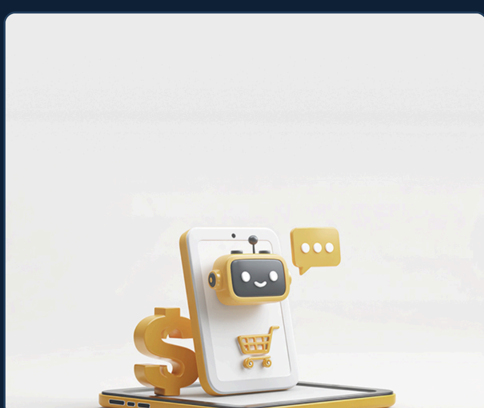
FREE MEMBER RESOURCE · PROMPT LIBRARY

The Agency Chatbot Playbook

31 prompts to design, build and launch automated sales chatbots for your HighLevel clients — then sell the build, the retainer and the results.



31 PROMPTS · 6 CATEGORIES
DISCOVERY TO RETAINER

Where HighLevel agencies get unstuck.

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What's inside

INTRODUCTION

Why chatbots are an agency service now

Your clients lose deals for one boring reason: they answer too slowly. The average business takes 42 hours to reply to a new lead. Wait just 30 minutes and the odds of qualifying that lead drop by a factor of 21. Your clients know this — they feel it every time a form fill goes cold — but they can't fix it themselves. They're on job sites, in treatment rooms, behind the counter.

That gap is your service. You already run their HighLevel sub-account. Conversation AI, workflows, missed-call text-back, webchat, SMS, Messenger and Instagram DM are all sitting in the platform you sold them. What most agencies are missing isn't tooling — it's the conversation itself: what the bot should say, ask, qualify and hand off, in the client's voice, for the client's offer.

This library closes that gap. It's 31 prompts you run with an AI assistant (Claude, ChatGPT or similar) to do the thinking work of a chatbot build: extracting the client's sales process, writing scripts that sound like them, choosing channels, designing qualification logic, wiring conversion tactics and proving results in a monthly report. Each prompt produces an artifact — a script, a flowchart, a tag taxonomy, an audit checklist — that maps directly onto something you build in HighLevel.

The prompts follow delivery order. Discovery first. Then conversation design. Then channel setup. Then qualification, conversion and measurement. Run them once for your first client and you have a build. Run them again with new placeholders and you have a productized service — one you can snapshot, price and repeat.

> WHAT THIS ISN'T
>
> A way to remove humans from your client's business. Qualified buyers still get a human. The bot handles the "what are your hours?" and "do you take insurance?" volume, qualifies the rest and books the calendar — so when your client picks up a conversation, it's with someone worth their time. The client stays human. The system handles the rest.

GUIDE

How to use this library

1 Fill the placeholders with discovery, not guesses

Every [BRACKETED PLACEHOLDER] wants real client input. Pull answers from your onboarding call, their existing chat logs, reviews and call recordings. Prompt 1 is designed to run the discovery interview for you.

2 Run the prompts in order, one conversation each

Paste one prompt per AI conversation so context stays clean. Save every output into a client build document — that document becomes your paper map before you touch a workflow builder.

3 Translate outputs into HighLevel

Scripts become Conversation AI training and workflow messages. Qualification logic becomes tags, custom fields and pipeline stages. Booking flows become calendars with reminder workflows. Nothing here requires tools outside the platform.

4 Snapshot everything that repeats

After your first build in a niche, snapshot the sub-account. Your second client in that niche gets 80% of the build on day one — you re-run only the discovery and voice prompts. That's the difference between selling hours and selling a product.

A note on pricing: agencies typically package this as a setup fee (the 4-week build) plus a monthly optimization retainer (prompts 28–31). The delivery playbook at the back maps prompts to weeks so you can scope both with confidence.

CATEGORY 01 · PROMPTS 1–5

Strategic foundation & client discovery

Extract what actually closes deals for your client before you build anything. These five prompts turn your onboarding call into the blueprint for the whole automation.

01 Client sales process extraction

Run this during onboarding — it turns your discovery call into a structured interview and gives you the skeleton of the entire bot.

```
Act as an expert sales analyst. I run a HighLevel agency and I'm documenting my client's sales process so I can build them an automated chatbot flow. Interview me with targeted questions, one at a time, to extract:

- The most common questions their prospects ask
- The information needed to qualify a lead
- The objections they typically hear
- The progression from first contact to closed sale
- The decision points that signal buying readiness

My client's business is: [CLIENT BUSINESS TYPE AND OFFER]
Their typical customer is: [TARGET AUDIENCE]
Their average sale value is: [PRICE RANGE]

Afterwards, produce a structured outline of their sales process that I can translate into a HighLevel Conversation AI flow and supporting workflows.
```

02 Customer journey mapping

Shows you where automated touches belong — and gives you a deliverable clients love seeing in the kickoff deck.

```
You are a customer experience strategist. Map the complete journey my client's prospect
takes from discovering the business to becoming a paying customer. Identify:

- The trigger that makes someone seek this solution
- Research-phase behaviors and questions
- The criteria they use to compare options
- Emotional states at each stage
- Friction points that cause abandonment
- The "aha moments" that accelerate decisions

Client details: [BUSINESS DESCRIPTION, TARGET MARKET AND PRIMARY OFFER]

Create a text-based journey map with stages, customer mindset, typical questions and —
critically — the opportunities for automated intervention at each phase (missed-call text-
back, form follow-up, webchat, DM reply, review request).
```

03 Qualifying question framework

The five to seven questions that separate buyers from browsers — these become your bot's qualification logic and your tag architecture.

```
Act as a sales qualification expert. Create 5–7 knockout questions that quickly identify
whether a prospect is a good fit for my client. The questions must filter for:

- Budget capability
- Decision-making authority
- Timeline and urgency
- Needs that match the offer
- Deal-breakers that disqualify

My client's business: [BUSINESS, SERVICES, IDEAL CLIENT PROFILE]
Minimum viable customer criteria: [MUST-HAVE CHARACTERISTICS]
Common time-wasters they see: [UNQUALIFIED LEAD PATTERNS]

Write each question in a conversational tone that feels helpful rather than interrogating,
and explain the strategic purpose of each so I can defend the flow to my client.
```

04 Value proposition crystallization

Most client websites bury the value prop. Your bot needs it in five seconds — this prompt distills it to chat length.

```
You are a messaging strategist specializing in clarity. Distill my client's value
proposition into chat-friendly language that can be understood in five seconds or less.

Their current description: [PASTE CLIENT WEBSITE COPY OR MARKETING MATERIAL]
What customers actually get: [TANGIBLE OUTCOME OR TRANSFORMATION]
How they differ from competitors: [UNIQUE APPROACH OR ADVANTAGE]

Transform this into: (1) a one-sentence hook that captures immediate attention, (2) a 3-
bullet benefit summary in "you get" language, (3) a question that helps prospects self-
identify as a good fit. Write everything at an 8th-grade reading level, suitable for SMS
and mobile chat.
```

05 Competitive response analysis

Your client's competitors are slow. Instant, useful replies are the differentiator — this prompt finds the exact angles.

```
Act as a market intelligence analyst. Help me understand how my client's competitors
respond to the same prospects, so the chatbot I build differentiates and wins.

Their competitors: [2–3 MAIN COMPETITORS OR TYPES]
Typical competitor approach: [SALES/MARKETING METHODS]
My client's advantages: [STRENGTHS]
Competitor weaknesses: [GAPS]

Suggest: what prospects likely experience from competitors, the friction points I can solve
with instant automated responses, messaging angles that position my client as the superior
choice and questions the bot should ask to surface those advantages naturally.
```

CATEGORY 02 · PROMPTS 6–12

Conversation design & copywriting

Scripts that sound like your client, not like a bot. Everything here feeds Conversation AI training and workflow message copy.

06 Hook-Value-Ask script generator

The greeting decides whether the conversation lives or dies. One framework, every entry point.

```
You are an expert chatbot conversation designer. Using the Hook-Value-Ask framework, create a complete greeting sequence for my client's automated chatbot.

Entry point: [AD CLICK, WEBCHAT WIDGET, MISSED-CALL TEXT-BACK, FORM SUBMISSION, IG DM, ETC.]
What the user was doing: [THEIR LAST ACTION BEFORE THE CHAT]
What they expect: [WHAT WAS PROMISED OR IMPLIED]

Create a 3-message sequence:
1. HOOK: acknowledge their context and set expectations (1 sentence)
2. VALUE: deliver the promised information or answer the implied question (2–3 sentences max)
3. ASK: a simple binary or multiple-choice question that advances the conversation

Keep each message under 20 words, casual and conversational. End with quick-reply options, not open-ended questions.
```

07 Persona voice development

Deliver this as a "Bot Persona Document" — it doubles as Conversation AI personality training and a client sign-off artifact.

```
Act as a brand voice specialist. Define a consistent personality for my client's chatbot that matches their brand and resonates with their audience.

The brand personality: [PROFESSIONAL, EDGY, FRIENDLY, LUXURIOUS, ETC.]
Target audience: [DEMOGRAPHICS AND PSYCHOGRAPHICS]
Emotional state to create: [CONFIDENT, EXCITED, REASSURED, INSPIRED]

Create a Bot Persona Document with: a name for the bot, five personality traits with examples, a tone guide (formality, emoji usage, punctuation), 10 "do and don't" copywriting rules, sample phrases that embody the voice and three bland-to-branded message rewrites. Format it so I can paste the rules directly into Conversation AI personality settings.
```

08 Objection response library

Pre-written IF-THEN responses your bot deploys instantly — and your client's team can reuse in live chat takeovers.

```
You are a sales objection handling expert. Create pre-written responses to common
objections that my client's chatbot can deploy automatically.

The objections they typically hear: [LIST 5–10, E.G. "TOO EXPENSIVE", "NEED TO THINK ABOUT
IT", "NOT THE RIGHT TIME"]

For each objection create:
1. An empathetic acknowledgment (1 sentence)
2. A reframe or value reminder (1–2 sentences)
3. A micro-commitment question with quick-reply options

Format as IF-THEN logic: "IF the contact says X, THEN respond with Y." Keep responses under
30 words. The goal is moving the conversation forward, not winning an argument.
```

09 Mobile-first message optimization

Most of your client's conversations happen over SMS and DM. Every message must survive a single glance.

```
Act as a UX copywriter specializing in mobile messaging. I've drafted chatbot messages for
my client, but they're too long for SMS and DM. Optimize them using the "one breath rule" —
each message readable in a single glance.

My draft messages: [PASTE DRAFT MESSAGES]

Rewrite following these principles: max 15 words per bubble; break long explanations into
2–3 sequential messages; replace paragraphs with short lists; add line breaks for breathing
room; flag where an image or GIF replaces words; mark natural 1–2 second pauses between
messages (I'll implement them as wait steps in the workflow). Show before/after versions
with a one-line reason for each change.
```

10 Call-to-action progression

A commitment ladder from first reply to booked calendar slot — the spine of your conversation flow.

```
You are a conversion rate optimization specialist. Design a sequence of micro-commitments
that moves my client's prospect from initial interest to a high-commitment action.

The conversation's end goal: [BOOK APPOINTMENT, MAKE PURCHASE, REQUEST QUOTE, ETC.]

Create a 5-step commitment ladder from easiest possible engagement to final conversion. For
each step write:
- The specific ask
- Why it sits at this stage
- Exact CTA language with quick-reply options
- The alternative path if they say no

Assume the final step lands on a HighLevel calendar booking link.
```

11 FAQ automation design

Turns the client's top questions into a decision tree — and into Conversation AI knowledge base source material.

```
Act as a customer support automation specialist. Transform my client's most frequent
questions into a conversational decision tree that guides users to answers without feeling
like a phone menu.

Their top FAQs: [LIST 10-15 QUESTIONS]

Create a smart FAQ flow that: starts with a category-level question ("Is this about
pricing, scheduling or services?"); branches to specific answers under 30 words; links to
detailed resources when needed; always offers a "none of these" option that routes to a
human via live chat handoff; and ends each answer with a next question that keeps
engagement going. Map it as a text-based flowchart, then output the Q&A pairs in a clean
list I can feed into the Conversation AI knowledge base.
```

12 Contextual entry point scripts

HighLevel gives you many doors into one inbox. The bot's first line should match the door the lead walked through.

```
You are a chatbot strategist. I need different greeting scripts for each entry point into
my client's HighLevel sub-account, so the first message always matches what the lead
just did.

The entry points:
1. [E.G. "MISSED-CALL TEXT-BACK"]
2. [E.G. "WEBSITE CHAT WIDGET"]
3. [E.G. "FACEBOOK/INSTAGRAM AD CLICK-TO-MESSAGE"]
4. [E.G. "FORM OR SURVEY SUBMISSION"]
5. [E.G. "GOOGLE BUSINESS PROFILE CHAT"]

For each entry point create: a contextually relevant first message acknowledging what they
just did, what to deliver immediately if anything was promised, the natural first question
and quick-reply options matched to likely intent. Each greeting must feel like a
continuation of their action — never a generic "How can I help you?"
```

CATEGORY 03 · PROMPTS 13–16

Channel strategy & HighLevel setup

Which channels to switch on first, how to work inside Meta's messaging rules and how to clear the compliance gates that stall launches.

13 Channel recommendation analysis

Don't switch on every channel at once. Pick the one home base where this client's leads already are.

```
Act as a marketing technology consultant. Help me choose the primary channel for my
client's chatbot inside their HighLevel sub-account, based on where their customers
actually are.

Client business type: [B2B/B2C/SERVICE/ECOMMERCE]
Audience demographics: [AGE, LOCATION, TECH-SAVVINESS]
Where they currently get engagement: [PHONE CALLS/INSTAGRAM/FACEBOOK/WEBSITE/GOOGLE]
Primary goal: [LEAD GEN/DIRECT SALES/APPOINTMENT BOOKING/SUPPORT]
Their team's responsiveness: [WHO ANSWERS, HOW FAST]

Evaluate SMS, webchat, Messenger, Instagram DM, WhatsApp and Google Business Profile chat.
Recommend: the single best home-base channel with reasoning, pros and cons for this
business model, which channel to add second and any limitations or compliance requirements
I should flag to the client before launch.
```

14 24-hour window strategy

On Messenger, Instagram and WhatsApp the free reply window is 24 hours. Design the timing before you build the workflow.

```
You are an expert in Meta messaging policies. Design a conversation timing strategy for my
client's bot that maximizes the free 24-hour messaging window and minimizes reliance on
paid templates.

Their typical sales cycle: [HOURS/DAYS FROM FIRST CONTACT TO CLOSE]
Their business hours: [OPERATING HOURS AND TIME ZONE]

Create a timing plan covering: the immediate first response; strategic check-ins within the
window (suggest 3-hour and 20-hour marks); what should extend the conversation vs let it
close; a "23-hour last call" script that encourages re-engagement; criteria for when a paid
template is worth it; and how to write CTAs that train leads to reply quickly. Explain the
psychology behind each timing decision, and note which steps I should implement as workflow
wait steps vs Conversation AI behavior.
```

15 Compliance & verification preparation

A2P 10DLC registration and Meta verification are where client launches stall. Gather documents in week one, not week four.

```
Act as a business compliance advisor. I'm preparing my client's sub-account for A2P 10DLC
registration (SMS) and Meta business verification (Messenger/Instagram/WhatsApp APIs).
Create a checklist and guide me through the documentation.

Client business structure: [LLC/CORPORATION/SOLE PROPRIETOR]
Legal name: [EXACT LEGAL NAME]
Operating name if different: [DBA]
Location: [COUNTRY/STATE/CITY]

Provide: the complete document checklist; formatting requirements; common rejection reasons
and how to avoid them; how to keep names matching exactly across EIN, website and
registration; sample campaign use-case descriptions and opt-in language that pass review; a
step-by-step process with time estimates; and what to do if rejected. Make it actionable
enough to send the client a document request email today.
```

16 Multi-channel expansion plan

Once the home base performs, expansion is an upsell. This prompt writes the 90-day plan you pitch at the quarterly review.

```
You are a marketing automation architect. My client's chatbot performs well on its primary
channel and I'm ready to expand. Design a phased rollout across additional channels without
creating operational chaos.

Current channel: [SMS/WEBCHAT/MESSENGER/ETC.]
Performance: [CONVERSION RATES, VOLUME]
Channels under consideration: [LIST 2–3]

Create a 90-day expansion plan: which channel to add first and why; how to adapt existing
scripts to the new channel's user psychology; how to keep everything in the unified
HighLevel conversations inbox; tagging and routing logic to keep leads organized by source;
which conversations should funnel to the primary channel vs stay native; time and team
requirements; and the success metrics that decide whether a channel stays or goes.
Sustainable growth over being everywhere.
```

CATEGORY 04 · PROMPTS 17–21

Lead qualification & pipeline automation

Where the bot becomes a sales system: knockout flows, lead scoring, tag architecture, calendars and recommendation logic — all mapped to HighLevel primitives.

17 Knockout question flow builder

Filter fast and filter fair — disqualified leads should still leave feeling helped.

```
Act as a lead qualification expert. Design a conversational flow using knockout questions
that filters my client's unqualified prospects early.

Qualifying criteria:
- Budget minimum: [AMOUNT]
- Geographic limits: [SERVICE AREA]
- Timeline: [HOW URGENT MUST THE NEED BE]
- Authority: [MUST THEY BE THE DECISION MAKER]
- Other deal-breakers: [CRITERIA]

Create: the knockout question sequence ordered most to least restrictive; exact phrasing
with quick-reply options; polite disqualification messages that offer an alternative (a
resource or referral); qualification messages that build excitement toward booking; the tag
to apply for each answer so I can build the branches as workflow conditions; and a
flowchart of the decision tree.
```

18 Lead scoring system design

A point system the bot applies automatically, so your client's team always calls the hottest lead first.

```
You are a sales operations specialist. Create a point-based lead scoring system that my
client's chatbot applies automatically, so their team knows who to contact first.

Client business model: [OFFERING AND SALES PROCESS]
High-quality lead signals:
- [E.G. "MENTIONED AN URGENT PROBLEM"]
- [E.G. "BUDGET OVER $5,000"]
- [E.G. "WANTS TO START WITHIN 2 WEEKS"]
- [E.G. "CURRENTLY USING A COMPETITOR"]
- [E.G. "ENGAGED WITH MULTIPLE MESSAGES"]

Create: point values per factor (100 total); thresholds for Cold (0–30), Warm (31–60) and
Hot (61–100); routing rules per tier — which pipeline stage to move them to, which tag to
apply and how fast a human should follow up; and how to store the score in a custom field
so it shows on the contact record and in smart lists.
```

19 Segmentation tag architecture

Design the tag taxonomy once, per niche — it powers every follow-up campaign and becomes part of your snapshot.

```
Act as a CRM data architect. Design a comprehensive tagging system my client's chatbot will
apply to contacts based on their responses, enabling segmentation and personalized follow-
up in HighLevel.

The client offers: [PRODUCTS/SERVICES/PACKAGES]
Customer types: [BUYER PERSONAS OR USE CASES]

Create a tag taxonomy across six categories: Interest (what they want), Readiness
(timeline), Budget (price tier), Behavior (engagement level), Source (channel and campaign)
and Lifecycle (awareness, consideration, decision). List 3–5 tags per category with a
consistent naming convention (e.g. "int-", "ready-", "src-" prefixes), explain when the bot
applies each and show how tags combine into smart-list segments for follow-up campaigns.
```

20 Appointment booking logic

From conversation to confirmed calendar slot — with the reminder sequence that kills no-shows.

```
You are a scheduling automation expert. Design a chatbot flow that moves my client's
qualified leads from conversation to booked appointment on a HighLevel calendar
without friction.

Appointment types:
- [TYPE 1: E.G. "15-MINUTE DISCOVERY CALL — FREE"]
- [TYPE 2: E.G. "45-MINUTE CONSULTATION — $50 DEPOSIT"]
- [TYPE 3: E.G. "ON-SITE VISIT — QUALIFIED LEADS ONLY"]

Create: decision logic for which prospects get which appointment type; pre-qualification
questions before the calendar link appears; a confirmation sequence with details recap, how
to prepare, cancellation policy and add-to-calendar link; a reminder schedule (SMS and
email timing) built as a workflow; no-show prevention tactics; and the fallback when their
preferred time isn't available. The booking should feel like a gift, not a transaction.
```

21 Product recommendation engine

For clients with catalogs or service menus: a 3-question quiz that guides buyers to the right option.

```
Act as an e-commerce personalization specialist. Create a conversational recommendation
flow that asks diagnostic questions and guides my client's customers to the right product
or service.

The catalog: [PRODUCTS/SERVICES/CATEGORIES]
Common confusion points: [WHAT MAKES CHOOSING HARD]

Design a quiz-style flow: an opening question that sorts customers into 3–4 broad buckets;
2–3 follow-ups per bucket; a final recommendation with why it fits, what makes it special,
social proof and a clear purchase or booking CTA; an alternative if they're unsure; logic
for "none of these fit"; and the tag to store their preference for future campaigns. Keep
the whole quiz to 3–4 questions — speed beats perfect precision.
```

CATEGORY 05 · PROMPTS 22–27

Conversion optimization & revenue

The flows that turn a working bot into a revenue machine — recovery sequences, upsells, human handoffs, payment plans and ethical urgency. This is where you prove ROI.

22 Abandonment recovery sequence

Leads who saw pricing and went quiet are the cheapest revenue your client will ever recover.

```
You are a conversion optimization expert specializing in abandonment recovery. Design a
multi-message sequence that re-engages my client's leads who viewed products or pricing but
didn't complete the purchase or booking.

Average sale value: [AMOUNT]
Common abandonment reasons: [PRICE SHOCK, COMPARISON SHOPPING, DISTRACTION]
The client's edge: [WHAT MAKES THEM WORTH COMING BACK TO]

Create:
1. The 3-hour nudge: low-pressure check-in (frame it as a tech issue, not pressure)
2. The 12-hour value reminder: reinforce benefits, add urgency if real
3. The 23-hour last call: final message before the Meta window closes
4. The day-3 re-open: an SMS or paid-template message with a compelling reason to return

For each message give exact copy, quick-reply options, what happens on each reply or on
silence and the tag to apply. Include A/B variations for the key messages.
```

23 Upsell & cross-sell flow design

The moments right after purchase are the highest-trust window in the whole relationship. Don't waste them.

```
Act as a revenue optimization strategist. After a customer completes a purchase or booking
through my client's chatbot, design an upsell and cross-sell sequence that feels helpful
rather than pushy.

Primary offering: [WHAT THEY JUST BOUGHT]
Complementary offerings: [RELATED PRODUCTS/SERVICES/UPGRADES]
Typical customer lifetime value: [IF KNOWN]

Create a post-purchase flow: confirmation and celebration; an immediate logical add-on at
20–30% of the original price; a value-add suggestion that enhances the original purchase;
and a future-opportunity seed for the next sale. Include timing for each message
(immediate, +5 minutes, +1 hour) as workflow wait steps, exact copy with social proof,
accept/decline options, what to do if they buy the upsell and the tags that segment buyers
by behavior.
```

24 High-ticket handoff protocol

When a big deal shows up, the bot's job is to get out of the way gracefully — and get a human in fast.

```
You are a sales process engineer. Design the handoff protocol for when my client's chatbot
encounters a high-value opportunity that needs a human.

What qualifies as high-value:
- [E.G. "DEAL SIZE OVER $5,000"]
- [E.G. "COMMERCIAL/ENTERPRISE BUYER"]
- [E.G. "COMPLEX CUSTOM REQUIREMENTS"]

Create: exact IF-THEN trigger conditions for the handoff; the internal notification format
(SMS, email or in-app) with lead score, conversation summary, pain points and urgency
indicators; the transition message the bot sends ("Let me connect you with our senior
specialist…"); a suggested opening script for the human that references the chat history;
a response SLA (5–15 minutes for hot leads) enforced by the workflow; and the fallback if
no one responds within the SLA. The handoff must feel like an upgrade, not a failure of
the bot.
```

25 Payment plan conversation builder

Qualified-but-can't-pay-upfront is a solvable objection — especially with payment links and invoicing built into the platform.

```
Act as a pricing conversation designer. Many of my client's prospects are qualified but can't pay the full price upfront. Create a conversational flow that presents payment options in a way that reduces price objections.

Standard pricing: [PRICE]
Options the client can offer: [E.G. "3-MONTH INSTALLMENTS, 6-MONTH INSTALLMENTS, DEPOSIT + BALANCE"]

Design: the price reveal strategy (upfront vs after value is established); sticker-shock recovery that immediately presents the payment plan; transparent presentation of the math ("Would $X/month for Y months work better than $Z upfront?"); objection handling that separates "too expensive" from "wrong timing"; a downsell option if plans don't work; and a nurture sequence for "maybe later" responses. Include exact copy, quick-reply options and branching logic, ending with a payment link or invoice sent in-conversation.
```

26 Scarcity & urgency implementation

Real constraints only. Fake countdown timers burn your client's brand — and yours with it.

```
You are a behavioral psychology expert specializing in ethical persuasion. Help me build scarcity and urgency into my client's chatbot flows in a way that genuinely helps customers decide — never manipulates.

Offer type: [PRODUCT/SERVICE/APPOINTMENT]
Real constraints: [E.G. "LIMITED APPOINTMENT SLOTS", "SEASONAL DEMAND", "PROMOTIONAL PERIOD"]
Purchase cycle: [TYPICAL TIME FROM FIRST CONTACT TO SALE]

Create: real scarcity indicators ("Only 2 slots left this week", "Sale ends tonight at midnight — Eastern"); urgency copy at three intensities (soft for early conversation, medium for qualified leads, hard at the decision point); anti-manipulation checks ensuring every claim is verifiable; and a "what not to do" list of false-scarcity red flags. Provide five before/after examples showing a generic message upgraded with honest urgency.
```

27 Social proof integration strategy

Your client's reviews are sitting in their Google profile doing nothing. Put them to work mid-conversation.

```
Act as a trust-building specialist. Design how my client's chatbot should deploy social
proof throughout the conversation to overcome skepticism.

Available proof:
- Reviews: [HOW MANY, AVERAGE RATING, BEST QUOTES]
- Case studies or results: [1–2 BEST OUTCOMES]
- Credibility markers: [YEARS IN BUSINESS, CERTIFICATIONS, NOTABLE CLIENTS]

Create a deployment strategy: what belongs in the greeting (if anything); mid-conversation
reinforcement with exact phrasing ("Our clients typically see [specific result]…");
objection-matched proof — quality worries get quality testimonials, ROI worries get ROI
numbers; where a screenshot or review image outperforms text; and the closing nudge ("Join
1,200+ customers who…"). Identify 3–5 specific moments in a typical flow where proof should
appear, with copy for each.
```

CATEGORY 06 · PROMPTS 28–31

Analytics, reporting & the retainer

Measurement is what turns a one-time build into a monthly retainer. These four prompts are your recurring deliverables.

28 Client reporting dashboard design

One North Star metric — revenue per conversation — plus the supporting numbers that diagnose problems before the client notices them.

```
You are a chatbot analytics expert. Define which metrics actually matter for measuring the automated sales engine I run for my client — both for my optimization work and for their monthly report.

Client business model: [LEAD GEN/DIRECT SALES/APPOINTMENT BOOKING]
Their primary goal: [MORE REVENUE/LOWER COST PER LEAD/BETTER QUALIFICATION]

Create a dashboard concept with: a North Star metric (e.g. revenue per conversation); 5–7 supporting metrics — conversation start rate, completion rate, qualification rate, booking rate, speed to first response, drop-off points and handoff success; the vanity metrics to leave out of the client report; a weekly review process with actions per finding; and red-flag thresholds that mean something is broken. Explain how to calculate each from HighLevel's dashboard and conversation data, and what "good" looks like for this industry.
```

29 A/B test planning framework

Sequential, one-test-at-a-time optimization — the substance behind your "continuous improvement" line item.

```
Act as a conversion optimization scientist. Design a systematic A/B testing program for my client's chatbot that improves performance without creating chaos.

Current conversion rate: [IF KNOWN]
Monthly conversation volume: [APPROXIMATE]
Priority area: [E.G. "DROP-OFF AT THE PRICING REVEAL"]

Create a testing roadmap: a prioritization matrix (impact vs ease); test designs for five high-impact elements — greeting variations, value proposition phrasing, CTA copy, question sequencing and timing between messages; sample size needed for significance at this volume; test duration; a documentation template for hypotheses and results I can share in client reports; and the process for declaring a winner and rolling it out. Sequential tests only, one at a time.
```

30 Conversation flow audit checklist

Run this weekly across every client sub-account. Scored audits are also a great pre-sale foot in the door.

```
You are a chatbot quality assurance expert. Create a comprehensive audit checklist I can
run weekly on my client's chatbot to catch problems and find optimization opportunities.

The bot currently handles: [WHAT IT DOES]
Known complaints or confusion: [IF ANY]

Organize the checklist as:
A. Conversation health — drop-off analysis, dead ends, "I didn't understand" frequency,
conversation length
B. Copy and UX — bubbles over 20 words, quick-reply functionality, typos, tone consistency
C. Technical — response speed, calendar booking, payment links, CRM sync, mobile rendering
D. Business logic — tagging accuracy, qualification decisions, routing speed for high-
value leads

Format as yes/no items with a scoring system, so I can track the score month over month and
show the trend in client reports.
```

31 User feedback collection system

Qualitative insight without annoying your client's customers — every response maps to a flow revision.

```
Act as a customer experience researcher. Design a lightweight feedback mechanism built
into my client's chatbot that surfaces where it helps, confuses or fails — without
annoying users.

The questions I need answered:
- Is the bot helpful or annoying?
- Where does it confuse people?
- What questions is it failing to answer?

Create: an end-of-conversation survey (1–2 questions max, tap-friendly rating, optional
comment); strategic check-in points mid-flow ("Did that help?"); frustration detection —
keywords and patterns that should trigger an immediate human handoff; a weekly review
process for spotting patterns; and clear action triggers (e.g. three similar complaints =
rewrite that step). Maximum insight, minimum friction — users should barely notice they're
being surveyed.
```

IMPLEMENTATION

The 4-week delivery playbook

This is the sequence agencies use to scope, price and deliver a chatbot build as a fixed 4-week engagement — then convert it into a monthly retainer.

WEEK 1

Prompts 1–5

Discovery and foundation

Run the discovery interview (Prompt 1) live on your onboarding call, then map the journey, qualification criteria, value proposition and competitive angles. Send the client the compliance document request (Prompt 15) now — A2P and Meta verification run in the background while you build. Without this foundation everything else is guesswork.

WEEK 2

Prompts 6–12

Conversation design and scripts

Build the greeting sequences, bot persona, objection library and FAQ tree, then optimize everything for mobile. Get the client's sign-off on the Bot Persona Document before you build — it prevents the "that doesn't sound like us" revision cycle. By Friday you have complete written scripts for every conversation path.

WEEK 3

Prompts 13–14, 17–21

Build in the sub-account

Pick the home-base channel and timing strategy, then translate your paper map into HighLevel: Conversation AI training, workflows, knockout branches, tags, custom fields, pipelines and calendars. This is the week the bot goes from greeting machine to qualification system.

WEEK 4

Prompts 22–27

Conversion layer and launch

Add recovery sequences, upsells, the high-ticket handoff, payment plans, urgency and social proof. Test every entry point yourself, verify every tag fires and every branch leads somewhere, then launch on a small traffic segment. Snapshot the sub-account the day you launch — that snapshot is your product.

MONTHLY

Prompts 28–31

The optimization retainer

Report the dashboard, run one A/B test, complete the weekly audits and review feedback. Find the single biggest drop-off point each month and fix that one step. Small targeted improvements compound — and a report showing revenue per conversation trending up renews itself.

QUARTERLY

Prompts 4–5, 16

Strategic review and expansion

Present the multi-channel expansion plan as an upsell, refresh the value proposition and competitive analysis and re-check scoring thresholds against the client's actual customer mix. The bot should evolve with their business, not stay frozen at launch.

PRINCIPLES

Six principles that make builds stick

01

Paper before workflows

Map every flow on paper before opening the workflow builder. The most expensive mistake in chatbot delivery is constructing a digital maze without a blueprint — and billing the client for the rework.

02

Sell the next step, not the product

The bot never closes in the first message. Every interaction follows Hook-Value-Ask: acknowledge context, deliver value, then ask one simple question that moves the conversation forward one step.

03

Qualify early, qualify ruthlessly

Knockout questions belong in the first three to five interactions. Automation spent on unqualified leads wastes everyone's time — and pads your client's pipeline with contacts that make your reporting look worse.

04

Respect the 24-hour window

On Meta channels, every design decision accounts for the timer. End every interaction with a question that compels a reply. Silence isn't rejection — it's distraction. Build recovery flows to bridge the gap.

05

Report revenue, not vanity

Open rates and conversation counts don't renew retainers. Track revenue per conversation as the North Star and build every client report around the numbers that connect to profit.

06

Launch is day one, not the finish line

Version one is the worst version. Review chat logs weekly, find the biggest drop-off, rewrite that step. Agencies that win with chatbots aren't the ones that build the best v1 — they're the ones that iterate fastest after launch.

Final thoughts

These 31 prompts are a complete system for building, launching and refining automated sales conversations as an agency service — from extracting your client's best salesperson's instincts to proving the revenue impact of every message the bot sends.

Start with the foundation prompts. Get the sales process documented before writing a single line of script. Build systematically: scripts first, platform second, optimization third. The goal is that when your client picks up a conversation, they're talking to a qualified, informed, engaged prospect who's ready to decide. The bot handles the volume. Their team handles the close. And your agency captures the revenue that used to bleed away in the 42 hours nobody replied.

ABOUT NEXUS HUB

You just read the playbook. Members get the shortcuts.

Nexus Hub is the community for HighLevel agencies ready to scale, optimize and connect. Bring your stuck point to a weekly Q&A, leave with a plan — and skip the parts of this playbook someone has already built for you.

Weekly Q&A sessions

Live answers from experts who run agencies just like yours.

Snapshots & templates

Pre-built sub-account snapshots — including chatbot flows like these.

Private community

Operators who've solved the problem you're stuck on this week.

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