A 90-DAY OPERATING PLAN FOR HIGHLEVEL AGENCIES

# The 90-day agency transformation.

Get out of the operator trap. Reclaim 20+ hours a week by turning your HighLevel agency into a business that runs on systems — not on you.


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START HERE

# You are the bottleneck

You bought HighLevel to create freedom. The reality is probably very different. Every morning starts with a buzzing phone: a client can't find their funnel, a workflow broke overnight, a sub-account needs a fix that only you know how to make. You've become the highest-paid support tech in your own agency, and growth is capped by the number of hours you can stay awake.

This isn't a unique struggle. It's the default state for thousands of talented agency owners. You're stuck in the **operator trap**: you believe being irreplaceable makes you valuable. In reality it makes you the single point of failure. If every decision routes through you, revenue plateaus, stress compounds and your exit strategy stays imaginary.

The difference between a stagnant agency and a scaling one isn't luck, timing or raw talent. It's systems. And here's the good news: you already own the best systems platform in the agency world. Most owners use 10% of what HighLevel can do and burn the other 90% of their week doing manually what the platform would do for free.

Over the next 90 days you'll dismantle the hero mentality and replace it with a systems-first mindset. The goal is specific and measurable: **reclaim 20+ hours of your work week by Day 90** — not by doing less work, but by doing different work. Less operator, more owner.

HOW THIS GUIDE WORKS

**Phase 1 · Days 1–30**

Foundation and focus. Find the bottlenecks, pick a niche, simplify the offer.

**Phase 2 · Days 31–60**

Systems and delegation. Document the processes, automate them, make your first key hire.

**Phase 3 · Days 61–90**

Optimization and scale. Build the acquisition engine, know your numbers, step into the visionary seat.

Each phase ends with a one-page worksheet. Print it, fill it in and pin it above your desk. Members can bring any step to the weekly Nexus Hub Q&A and get unstuck live.

PHASE 1 · DAYS 1–30

# Foundation and focus

Identify the bottlenecks, strip away the non-essential and get clear on exactly who you serve — so everything you systemize later is worth systemizing.

## Step 1 — The operator audit DAYS 1–5

You can't reclaim time if you don't know where it's going. Most owners run on gut feeling and assume they spend their week on strategy. The data usually tells a different story.

**The action:** for five consecutive days, track your time. No estimating. Every 30 minutes, write down exactly what you did. At the end of the week, sort every task into one of two buckets:

- **Operator work:** building funnels, writing proposals, answering routine client emails, fixing broken workflows, troubleshooting sub-accounts, QAing deliverables.
- **Owner work:** designing systems, hiring and interviewing, strategic financial planning, partnerships and business development.

**The reality check:** if more than 30% of your time is operator work, you have a crisis. Your goal for Day 90 is to flip that ratio.

> EXERCISE · THE STOP-DOING LIST
>
> From your operator column, pick the three tasks that eat the most time but need the least of your specific genius — scheduling calls, chasing invoices, formatting reports. Write them on a sticky note on your monitor. These are the first tasks you'll hand to a HighLevel workflow in Phase 2.

## Step 2 — Ruthless specialization DAYS 6–15

Generalist agencies can't scale on HighLevel because every client means a new build from scratch. When you do everything for everyone, you can't build systems — only chaos. Specialization is what makes snapshots possible: build the machine once, deploy it forever.

**Activity — the client profitability matrix:** list your last 20 clients. Rank them by profit margin (not revenue), then by ease of delivery (stress level). Look for the overlap. You'll likely find your most profitable, low-stress clients cluster in one industry — while the high-stress, low-margin ones are scattered everywhere else.

**The decision:** commit to a niche. It's terrifying and necessary.

- **Bad niche:** "We do digital marketing for small businesses."
- **Good niche:** "We book 30 appointments a month for med spas with done-for-you HighLevel automation."

> WHY THIS PAYS IN HIGHLEVEL
>
> One niche means one snapshot. Your funnels, workflows, pipelines, calendars and email sequences become a single master build you deploy to every new sub-account in one click. Agencies that niche down routinely cut onboarding from two weeks to two days — and charge more for it, because they're the expert.

## Step 3 — Service streamlining DAYS 16–30

Now simplify what you sell. Complexity kills scale: 50 services means 50 SOPs, 50 delivery templates and 50 ways to disappoint someone. Kill the bloat — any service with low margin and high operational complexity goes.

**Create your core offer.** Package your services into a predictable outcome and move away from hourly billing:

- **Old way:** "We charge $150/hour for marketing services."
- **New way:** "The 90-day med spa growth system — $4,500 setup plus $1,500/month, powered by our proven snapshot."

When you sell a packaged result, you can estimate costs, hire specialists and template the delivery inside HighLevel. You stop writing custom proposals from scratch — and SaaS-mode recurring revenue starts stacking underneath the service fee.

## Phase 1 worksheet

COMPLETE BY DAY 30

MY OPERATOR RATIO

Hours tracked this week: ______________

% spent on operator work: ______________

Target ratio by Day 90: **30% operator / 70% owner**

MY STOP-DOING LIST

1. ____________________________________
2. ____________________________________
3. ____________________________________

MY NICHE COMMITMENT

We help ____________________________

achieve ____________________________

through ____________________________

MY CORE OFFER

Outcome promised: ____________________

Price: ______________________________

Service I'm killing: ____________________

PHASE 2 · DAYS 31–60

# Systems and delegation

Extract the processes from your brain, build them into HighLevel and hire the first key role to run them.

## Step 4 — Process mapping DAYS 31–40

Right now your agency runs on institutional knowledge — invisible processes that exist only in your head. If you get sick, the business stops. You need an operating system, and every scalable process has three parts:

- **Inputs:** what triggers the start? (A signed contract, a form submission, a pipeline stage change.)
- **Steps:** what happens, in what order?
- **Outputs:** what's the measurable result? (Welcome email sent, sub-account created, kickoff call booked.)

**The action:** pick one core process — client onboarding. It's the most repetitive, most time-consuming admin task an owner does, and it's the one HighLevel automates best. Map it, then build it:

- **Trigger:** invoice paid or contract signed moves the opportunity to "Won" in your pipeline.
- **Workflow:** HighLevel sends the welcome email, delivers the intake form, drops a kickoff-call calendar link and notifies your team channel — automatically.
- **Snapshot:** the client's sub-account deploys from your master snapshot with funnels, workflows and pipelines pre-built.

For the human steps that remain, write an SOP. Don't write a novel — record your screen while you do the task once, talk through it and have a team member turn the recording into a checklist (the full SOP template is in the toolkit at the back of this guide).

> THE FOOLPROOF TEST
>
> Hand your SOP to someone who doesn't know your business. Ask them to complete the task. If they ask a single question, the SOP is incomplete — revise it. An SOP that needs you to explain it isn't an SOP.

## Step 5 — The strategic first hire DAYS 41–50

You have a niche and a documented onboarding process. Now you need a person to run it. Most owners hire wrong — they hire another creative or another funnel builder, because that's the work they enjoy. You don't need another builder yet. You need organization.

**Your first key hire: a project manager / operations coordinator.** Their sole job is making sure nothing falls through the cracks, so you can stop being the reminder system for your team. They run onboarding from your SOP, manage timelines and tasks inside HighLevel, chase deliverables and keep the pipeline board honest.

**Why this alone saves 10+ hours a week:** a good PM removes the mental load of status checks. You stop remembering deadlines and start reading a dashboard the PM keeps current.

**Hiring tip:** don't look for a rockstar who wants to change everything. Look for someone who loves checklists, hates chaos and finds deep satisfaction in completion.

## Step 6 — The art of the hand-off DAYS 51–60

Delegation is not dumping. It's a systematic transfer of authority — and it fails when you expect people to read your mind. Use the five-stage framework:

1. **I do, you watch.** Record the process.
2. **I do, you help.** They handle the admin parts.
3. **You do, I help.** They run it, you supervise.
4. **You do, I watch.** They run it, you QC.
5. **You do.** You only see the report.

**Implementation:** take client onboarding through stages 2 and 3 with your new PM this week. By Day 60 you should never create a sub-account, send a welcome email or set up a project file again.

## Phase 2 worksheet

COMPLETE BY DAY 60

ONBOARDING, AUTOMATED

☐ Master snapshot built and tested

☐ Onboarding workflow live (welcome email, intake form, kickoff link)

☐ Pipeline stages defined and in use

☐ Onboarding SOP passes the foolproof test

THE FIRST HIRE

☐ PM job description drafted

☐ Job ad posted

☐ Candidate shortlist (3+)

☐ Hand-off stage reached: ____ of 5

MY THREE SOPS THIS PHASE

1. Client onboarding · recorded ☐ written ☐ tested ☐
2. ______________________________ · recorded ☐ written ☐ tested ☐
3. ______________________________ · recorded ☐ written ☐ tested ☐

PHASE 3 · DAYS 61–90

# Optimization and scale

Point your reclaimed hours at revenue. Build the acquisition engine, master your numbers and step fully into the visionary seat.

## Step 7 — The client acquisition engine DAYS 61–70

You've freed up time. Do not fill it with more client work — fill it with business building. Referrals are luck; you need a system for leads. Run your own agency the way you'd run a client's: as a HighLevel machine.

**Select one channel** based on your niche, and build it inside your own agency account:

- **Content:** SEO and authority articles feeding a lead-magnet funnel (best long-term). Define the framework, hire a writer for drafts, you review strategy only.
- **Outbound:** cold email or LinkedIn outreach (best for immediate results). Build the sequences as HighLevel workflows with templated first-touch and automated follow-up — nobody should be typing the same email twice.

- **Paid:** ads into a booking funnel (best for scaling what already works). Your own snapshot is the delivery system.

Route every lead into a dedicated pipeline with automated follow-up. And don't ignore the goldmine you already have: a **database reactivation campaign** to past leads and dormant clients is usually the fastest revenue in this entire guide.

**The metric:** leads generated per week. If that number is zero, you are not safe — no matter how good this month's delivery looks.

## Step 8 — Financial mastery and the dashboard DAYS 71–80

You can't be an owner if you don't know your numbers. Revenue is a vanity metric — you need to track health. Build a five-minute dashboard that shows these vital signs at a glance:

- **Cash flow forecast:** how much cash will be in the bank in 30 days?
- **Pipeline value:** the probability-weighted value of open opportunities — straight off your HighLevel pipeline board.
- **MRR:** recurring revenue from retainers and SaaS-mode subscriptions. This is the number that makes your agency sellable.
- **Net profit margin:** are you actually keeping money?

**The action:** schedule a money date with your business every Friday at 2:00 PM (your time zone, on your calendar, recurring). Margins dipping below 20%? Raise prices or cut scope creep. Pipeline dry? Turn up the acquisition engine.

> PRICING POWER
>
> Use your niche to move toward value-based pricing. If your system makes a client $100k, charging $10k is a bargain — regardless of hours spent. This is how you disconnect income from time. Your snapshot took months to perfect; it deploys in minutes. Price the outcome, not the deploy.

## Step 9 — Operator to visionary DAYS 81–90

Home stretch. You have a niche, a PM, documented SOPs, automated onboarding and a financial dashboard. Now change how you identify yourself. Stop asking "How do I solve this?" Start asking **"Who can solve this? What system solves this?"**

**The no-meeting days:** designate Tuesdays and Thursdays as deep-work days. No client calls, no team questions (they go to the PM). Use the time to refine the agency vision, develop new service lines and build strategic partnerships.

**Anticipate the dip:** as you step back, things will break. A client will complain they couldn't reach you instantly. A deliverable will ship with a typo. Do not swoop in to save the day — if you fix it yourself, you teach your team that you're the safety net. Instead: "What does the SOP say? How do we update the SOP so this doesn't happen again?"

## Phase 3 worksheet

COMPLETE BY DAY 90

ACQUISITION ENGINE

☐ One channel chosen: ________________

☐ Lead pipeline + follow-up workflow live

☐ Database reactivation campaign sent

☐ Leads per week: ____________________

MONEY DATE METRICS

30-day cash forecast: ________________

Pipeline value: ______________________

MRR: ______________________________

Net margin: ____________ (target 20%+)

VISIONARY HABITS

☐ Tuesday + Thursday deep-work days blocked ☐ Team routed to PM, not me ☐ One full weekend without checking email

DEEP DIVE

# The toolkit

## 1. The delegation decision matrix

Use this whenever you're unsure whether to hand off a task.

| Question | If yes... | If no... |
|---|---|---|
| **Is it recurring?** | Document it — better yet, build it as a workflow. | Do it yourself (for now). |
| **Does it need your unique genius?** | Keep it — that's owner work. | Delegate it. |
| **Is the risk of error low?** | Delegate immediately. | Train, then delegate. |
| **Do you enjoy it?** | Careful — is it profitable? | Delegate it. |

## 2. The ideal SOP structure

**Title:** [task name] · **Owner:** [role responsible] · **Frequency:** [daily / weekly / ad hoc]

**Definition of done:** what does success look like?

**Prerequisites:** logins, file locations, which sub-account.

**Steps:** numbered, imperative verbs. "Open Automation," "Click Create Workflow," "Select the trigger."

**Video:** a screen recording of you doing the task once, linked at the top.

**Troubleshooting:** if X happens, do Y.

**Escalation:** who to contact if stuck (hint: the PM, not you).

## 3. The HighLevel stack for freedom

You're already paying for most of your freedom stack. Use it.

| Job | Tool | What it replaces |
|---|---|---|
| **Clone your delivery** | HighLevel snapshots | Two weeks of manual setup per client |
| **Automate the busywork** | Workflows | Your stop-doing list: reminders, follow-ups, onboarding admin |
| **Track the money** | Pipelines + opportunities | A separate CRM subscription |
| **Store the knowledge** | Memberships as an internal training hub | Scattered docs nobody reads |
| **Track the work** | A PM tool your PM owns (ClickUp or Asana) | You being the reminder system |
| **Clone yourself** | Screen recordings (Loom or free alternatives) | Repeating the same training live, forever |

TROUBLESHOOTING

# Overcoming common obstacles

## ”My clients only want to talk to me”

That's the expertise trap — you trained them to expect you, so retrain them with a warm hand-off. Introduce your PM as a lead account specialist: "I've brought [name] on to make sure you get faster responses and nothing slips through the cracks. They're your primary contact for day-to-day updates, which lets me focus on the high-level strategy for your account." Frame it as an upgrade, because it is one.

## ”I don’t have time to write processes”

Use record and review. Next time you do the task, hit record and talk through what you're doing. Send the video to a team member with one instruction: "Turn this into a checklist." You review the checklist. Total extra time: five minutes.

## ”I can’t afford to hire yet”

You can't afford not to — but you don't need a full-time employee. Start with a virtual assistant for 10 hours a week. Or look at your stop-doing list: if you stop doing $20/hour work, you can sell more $200/hour strategy, which pays for the hire several times over.

FINAL WORDS

# An agency that runs on you is a job

Your agency is suffocating you because you designed it that way. You also have the power to redesign it.

The transition from operator to owner isn't about being lazy — it's about being strategic. It requires the uncomfortable choice to let go of control in the short term to gain freedom in the long term. By following this 90-day plan you're building an asset: an agency that runs on snapshots, workflows and a team executing a clear vision is a sellable, scalable business.

You have the blueprint. The only variable left is your resolve. Do not let next week look like last week.

## Your action plan

RIGHT NOW

☐ Block 30 minutes every morning for five days: the time audit

☐ Schedule a recurring one-hour SOP block for Friday mornings

THIS WEEK

☐ Complete the client profitability matrix; pick your niche

☐ Identify one service to cut or package

☐ Record your first onboarding video for a future SOP

THIS MONTH

☐ Draft the PM / ops coordinator job description and post it

☐ Build your master snapshot from your best client account

☐ Tape the stop-doing list to your monitor

BY DAY 90

☐ PM handling all day-to-day client communication

☐ Dashboard tracking your key metrics every Friday

☐ One full weekend without checking your email

WHERE HIGHLEVEL AGENCIES GET UNSTUCK.

# Don’t run the 90 days alone

Nexus Hub members get weekly Q&A sessions with operators who've made this exact transition, ready-built snapshots and templates, premium partner deals and a private community of agencies scaling the same way you are. Bring your stuck point, leave with a plan.

**Join Nexus Hub — nexushub.club**