

PROMPT PACK · 25 PROMPTS

SOP prompts for HighLevel agencies

25 AI prompts to document, train and optimize your agency's standard operating procedures — so fulfillment stops living in your head and starts living in a system.

Where HighLevel agencies get unstuck.

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READ THIS FIRST

How to use this pack

These prompts work with any AI assistant — Claude, ChatGPT, Gemini or HighLevel's Content AI. Unlike our client-facing packs, this one points inward: it documents how your agency runs, so it can run without you. Here's how to get real output instead of generic filler.

1 Fill every bracket

Replace each [placeholder] with how your agency actually works today — messy reality included. Vague inputs produce generic outputs.

2 Iterate before you ship

Treat the first response as a draft. Push back: "simplify to 10 steps", "write it for a brand-new VA." Two follow-ups usually double the quality.

3 Test with a real person

An SOP isn't done when it's written — it's done when someone who didn't write it completes the task without asking you anything.

4 Turn SOPs into snapshots

Any SOP that touches HighLevel — onboarding, campaign launch, reporting — should end up as workflows and templates inside a snapshot, not just a document.

Creating and documenting SOPs

Every agency bottleneck traces back to a process that lives in someone's head. Start with the processes you repeat for every client — onboarding, campaign launch, reporting — and document them so a new hire could run them on day one.

PROMPT 01 SOP template

Build the master template once — every SOP after this reuses its structure.

Act as an experienced process documentation specialist for marketing agencies. Create a detailed SOP template for [specific agency process, e.g. client onboarding]. Include sections for purpose, scope, responsibilities, tools and access needed, and step-by-step procedures. Key activities involved: [list activities]

PROMPT 02 Process breakdown

Brain-dump how you do the task today; the AI structures it into steps and sub-steps.

I need to document how my agency handles [specific task, e.g. launching a client's ad campaign]. Create a hierarchical breakdown of this process with main steps and sub-steps, including quality checkpoints and common troubleshooting scenarios. Here's an overview of how we do it today: [describe process]

PROMPT 03 Quality control metrics

Defines "done correctly" so quality doesn't depend on who did the work.

Help me develop clear quality control metrics for our [process name] SOP. The key objectives are [list objectives]. Suggest specific measurable indicators and acceptable ranges for each — strict enough to protect client results, loose enough that work still ships.

PROMPT 04 **Exception decision tree**

The difference between an SOP people follow and one they abandon is how it handles the weird cases.

Create a decision tree for handling exceptions in our [process name] SOP — e.g. a client misses onboarding calls, an approval stalls, an asset never arrives. Include decision points for the scenarios we actually hit: [list scenarios]

PROMPT 05 **Role-responsibility matrix**

Who executes, who reviews, who gets told. Kills the "I thought you had it" failure mode.

Design a role-responsibility matrix for our [department/process] SOPs. Include everyone involved in implementing, monitoring and updating the procedures. Our roles: [list roles, e.g. account manager, media buyer, VA]

PROMPT 06 **Validation checklist**

Run this before declaring any SOP "live."

Generate a comprehensive checklist for validating our [process name] SOP implementation — documentation completeness, training coverage, tool access, and edge cases handled.

PROMPT 07 **Risk and failure-point analysis**

Finds the steps where a missed handoff becomes a churned client.

Analyze our [process name] and identify potential failure points and risks — missed handoffs, single-person dependencies, client-visible breakage. Create preventive measures and a contingency step for each. Our current process flow: [describe process]

PROMPT 08 **Data protection protocols**

You hold logins, ad accounts and customer data for every client — treat that like the liability it is.

Develop data-security and access-control protocols to integrate into our [process name] SOP — credential management, client data handling, offboarding access revocation and incident response. Key concerns: [list concerns]

PRO TIP • HIGHLEVEL

Document your top 3 client-facing processes first: onboarding, campaign launch, monthly reporting. They're the ones that break publicly when a team member leaves — and the ones that convert most directly into snapshots.

Training and rollout

A documented process nobody follows is worse than no process — it gives you false confidence. These prompts build the training, communication and change management that make SOPs stick with your team and contractors.

PROMPT 09 Training program design

Structured onboarding to the SOP — objectives, methods and a pass bar.

Design a structured training program for our new [process name] SOP. Include learning objectives, training methods (video walkthrough, shadowing, practice runs), assessment criteria and completion requirements. The audience: [describe team — e.g. remote VAs, junior media buyers]

PROMPT 10 Scenario-based exercises

Practice on fake clients before real ones — including the angry-client edge cases.

Create scenario-based training exercises for our [process name] SOP. Include common situations, edge cases and emergency scenarios (an unhappy client, a broken automation, a missed deadline). Our team's experience level: [describe experience]

PROMPT 11 Competency assessment

The gate between "trained" and "trusted with client accounts."

Develop a competency assessment framework for evaluating proficiency in our [process name] SOP — both knowledge checks and practical demonstrations, with a clear pass threshold before someone works on live client accounts.

PROMPT 12 **Phased rollout plan**

Pilot with one client account, refine, then roll to the roster.

Create a phased implementation plan for rolling out our new [process name] SOP across the agency. Start with a pilot on [pilot scope], define success criteria for expanding, and minimize disruption to active client work.

PROMPT 13 **Team communication plan**

How you announce a new process determines whether it's adopted or resented.

Design a communication strategy for introducing our new [process name] SOP to the team. Include key messages (why this exists, what changes for whom), delivery format and a feedback channel. Audiences: [list — e.g. full-time staff, contractors, VAs]

PROMPT 14 **Change management plan**

For when the new process replaces "how we've always done it."

Generate a change management plan to drive adoption of our new [process name] SOP. Address likely resistance points and mitigation strategies. Current challenges: [list challenges — e.g. senior staff prefer their own methods]

Optimization and automation

A good SOP has a second life: every manual step it documents is a candidate for a HighLevel workflow. Documentation first, automation second — you can't automate a process you haven't defined.

PROMPT 15 Efficiency audit

Quarterly: feed in real delivery data, find the wasted hours.

Analyze our current [process name] SOP for optimization opportunities — efficiency, quality and resource use. Here's our current performance data: [include metrics, e.g. hours per client per month, revision rounds, missed deadlines]

PROMPT 16 Feedback collection framework

The people running the SOP daily know where it's broken. Ask them systematically.

Create a framework for collecting and analyzing team feedback on our [process name] SOP — quantitative metrics plus qualitative input, with a monthly review cadence. Key stakeholders: [list stakeholders]

PROMPT 17 Automation opportunity map

Which steps become workflows, which stay human. Be explicit that HighLevel is your stack.

Develop automation recommendations for our [process name] SOP. We run on HighLevel — identify which steps can become workflows, triggers, tasks or scheduled reports, and which must stay human. Current manual steps: [list processes]

PROMPT 18 KPI dashboard

Leading indicators catch process drift before clients notice it.

Design a KPI dashboard for monitoring our [process name] SOP effectiveness. Include leading and lagging indicators, data collection methods and reporting frequency.

PROMPT 19 Quality audit checklist

Spot-check delivered work against the standard monthly.

Create a quality audit checklist for our [process name] SOP — compliance checks, performance metrics and documentation review criteria. Our quality standards: [list standards]

PROMPT 20 Continuous improvement loop

SOPs decay. Build the review-and-update cycle into the SOP itself.

Develop a continuous improvement framework for our [process name] SOP — how improvement ideas get captured, evaluated, implemented and measured, with version control so everyone works from the current version.

PRO TIP · HIGHLEVEL

Pair every SOP with a Loom walkthrough of the process running in your actual HighLevel account. Written steps tell people what to do; the recording shows them what "done right" looks like.

Scaling across clients and locations

The payoff: an SOP written once, deployed for every client. This is the same muscle as snapshot-building — standardize the core, parameterize what varies per client.

PROMPT 21 Multi-client adaptation

Same process, different clients — define what's fixed and what flexes.

Help me adapt our [process name] SOP to run across multiple clients and niches. Identify which steps stay standardized and which need per-client variation. Our current client types: [list client types/niches]

PROMPT 22 Tool integration guidelines

When you add a tool to the stack, the SOPs it touches need updating — systematically.

Create guidelines for integrating our [process name] SOP with new tools and systems. Include compatibility requirements and integration checkpoints. Our current stack: [list systems — e.g. HighLevel, Slack, ClickUp, Google Drive]

PROMPT 23 Growth scaling framework

Will this process survive 3x the client count? Find out before you get there.

Develop a framework for scaling our [process name] SOP as the agency grows — increased client volume, new service lines and added team members. Current volume: [describe current scale] with a target of [describe growth target].

PROMPT 24 **Snapshot conversion plan**

The HighLevel-native endgame: the SOP's automatable half becomes a deployable snapshot.

Help me convert our [process name] SOP into a HighLevel snapshot plan. List the workflows, pipelines, email/SMS templates, forms and custom fields the snapshot should contain, and which SOP steps remain as human tasks alongside it. The process: [describe process]

PROMPT 25 **System dependency map**

Know what breaks downstream before you change anything upstream.

Design an integration plan connecting our [process name] SOP with our existing business systems. Map the data flow between tools and flag dependencies where a change in one system breaks the process. Current systems: [list systems]

Implementation playbook

Don't try to document the whole agency in a weekend. One process at a time, tested with a real person, then the next.

WEEKS 1–2 **First SOP.** Build your master template (01), then document your most painful process end-to-end (02–06). Usually that's client onboarding.

WEEKS 3–4 **Test and train.** Have someone who didn't write it run the SOP on a pilot (09–12). Every question they ask is a gap in the document.

MONTH 2 **Automate.** Run the automation map (17) and move the mechanical steps into HighLevel workflows. Repeat the cycle on your second process.

QUARTERLY **Audit and improve.** Efficiency audit (15), team feedback (16) and quality spot-checks (19). Convert your most-repeated SOP into a snapshot (24).

Rules that keep results coming

- Document reality, not aspiration — write down how the process actually runs today, then improve it.
- An SOP is done when someone else completes the task without asking you anything.
- Keep one source of truth with version control. Two versions of an SOP is zero SOPs.
- Every SOP review asks the same question: which of these steps can HighLevel do for us now?



THIS PACK IS JUST THE START

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