FREE MEMBER RESOURCE

THE PROMPT PLAYBOOK

Agency growth prompts

50 AI prompts for HighLevel agencies — from winning your next client to running SaaS mode without the guesswork.

Nexus Hub

Where HighLevel agencies get unstuck.

50 prompts | 7 stages

START HERE

How to use this guide

Every prompt in this playbook is written for one reader: the operator running a HighLevel agency. Paste them into Claude, ChatGPT or any capable AI assistant — they're tool-agnostic. Each one is a starting point, not a script; the more context you feed it, the sharper the output.

Anything in **[brackets]** is yours to fill in — your niche, your client's data, your numbers. A prompt with real inputs beats a clever prompt with none.

01 Work the stages in order — nail your niche and offer before you scale outreach or flip on SaaS mode.

02 Paste real material — call transcripts, client data, competitor pages. Context is the multiplier.

03 Iterate. Follow up, push back, ask for three alternatives. The second answer is usually better than the first.

04 Validate against reality. AI output is a draft — your clients, calls and dashboards are the truth.

What's inside

STAGE 01

Niche & offer

Everything downstream gets easier when you serve one niche with one sharp offer. Use these before you spend another dollar on outreach.

NICHE RESEARCH

1 "Act as a market research analyst. Based on these Facebook group threads, forum posts and review-site complaints [paste content], identify the top five recurring pain points that [niche — e.g. med spas, roofers, gyms] mention about getting and keeping customers. Rank by frequency and severity, and flag which ones an agency running HighLevel could solve within 30 days."

2 "You are a competitive analysis expert. Review these agencies already serving [niche] [paste websites or descriptions] and map their offers, pricing and guarantees. Identify the gaps — services they don't offer, promises they don't make, segments they ignore — that a new agency could own."

3 "Build a dream-client profile for an agency selling [service] to [niche]. Include business size, monthly revenue range, current marketing spend, the trigger events that make them buy, and the three objections they'll raise first. Base it on these notes from my sales calls [paste notes]."

OFFER DESIGN

4 "Acting as an agency offer strategist, design a productized offer for [niche] built on HighLevel: name it, define exactly what's included (funnels, automations, missed-call text-back, review management, etc.), set a setup fee and monthly retainer, and write the one-sentence promise that leads with the outcome, not the deliverables."

5 "Create 10 discovery-call questions that validate whether [pain point] is painful enough for [niche] to pay [price] per month to fix. Include questions about what they've already tried, what it's costing them and who decides."

6 "Compare my offer [describe offer and pricing] against these competitors [paste details]. Recommend where to position on price, what to add or cut to justify a premium, and one guarantee that reduces risk for the client without exposing me."

7 "Write a positioning statement for my agency: for [niche] who struggle with [pain point], we [what you do] so they get [measurable outcome] — unlike [alternative]. Give me five variants, from safe to bold, and explain which fits a local-service niche best."

STAGE 02

Client acquisition

Outreach, calls and proposals that book the calendar. Feed these prompts your real niche and real numbers — generic in, generic out.

OUTREACH

8 "Write a five-touch cold email sequence targeting [niche] owners about [pain point]. First email under 75 words, one idea per email, each with a different angle (proof, cost of inaction, quick win, case study, breakup). No hype words, no 'just following up'."

9 "Create direct-message scripts for reaching [niche] owners on [platform]. Three openers that reference something specific about their business, two follow-ups, and a soft pivot to a 15-minute call. Conversational, not salesy — I'll personalize the blanks."

10 "Build a discovery-call script for selling [offer] to [niche]: agenda-setting opener, qualifying questions, a diagnosis section that surfaces the cost of their current setup, and a close that presents the offer as the obvious next step. Include what to say if they ask for the price early."

CLOSING

11 "List the eight most common objections [niche] owners raise when offered [service] — including 'we already have a marketing person', 'we tried an agency before' and 'it's too expensive'. For each, give a two-sentence response that validates the concern and reframes it around outcomes."

12 "Rewrite this proposal [paste content] to lead with the client's numbers and outcomes instead of my deliverables. Cut it to one page: situation, plan, investment, timeline, next step. Keep every sentence about them, not about my agency."

13 "Turn these client results [paste metrics and context] into a one-page case study: the problem in the client's words, what we built in HighLevel, the numbers after 90 days, and a pull quote. Write it so a prospect in the same niche sees themselves in it."

14 "Create a 90-day plan to make my agency the obvious choice for [niche] in [market]: content topics that answer the questions they actually search, a Google Business Profile posting cadence, and two proof assets to build first. Prioritize by effort versus impact."

15 "Write three referral-ask messages for happy clients: one for right after a win, one for a QBR, one for an annual renewal. Each should make the ask specific ('one intro to another [niche] owner'), make it easy, and offer something real in return."

STAGE 03

Onboarding & snapshots

The first 14 days decide whether a client stays 14 months. Systemize onboarding once, then let your snapshot do the heavy lifting.

ONBOARDING SYSTEMS

16 "Design a 14-day onboarding plan for a new [niche] client on [offer]: day-by-day milestones, what I need from them and by when, the first quick win to deliver inside week one, and the check-in cadence. Format as a checklist I can turn into a HighLevel pipeline."

17 "Create a kickoff-call agenda and client intake questionnaire for [offer]. The questionnaire should collect every asset and access I need (branding, domains, phone, review profiles, ad accounts) in one pass, so I never have to chase the client twice."

18 "Write a welcome email sequence for new clients of [offer]: three emails across the first two weeks that set expectations, explain what's happening behind the scenes, introduce their point of contact and tell them exactly what to do next. Warm, direct, zero jargon."

SNAPSHOT DESIGN

19 "Spec a HighLevel snapshot for [niche]: the pipelines, calendars, forms, workflows, email/SMS templates and custom fields it should ship with, in build order. For each element, note what gets customized per client versus what stays standard."

20 "Design the pipeline stages for a [niche] business, from new lead to repeat customer. For each stage define entry criteria, the automation that fires, the human task if any, and the stall alarm — how long a contact can sit there before someone gets notified."

21 "Map a speed-to-lead follow-up sequence for [niche]: what fires in the first five minutes, first hour and first day after a form fill or missed call. Mix SMS, email and voicemail drops, write the copy for each touch, and keep the SMS compliant — identify the business, make opting out easy."

22 "Review this list of workflows in my [niche] snapshot [paste list] and identify what's missing, what's redundant and what will break when a client's business differs from the template. Suggest the three highest-value workflows to add next."

STAGE 04

Campaigns that convert

The campaigns you run inside client accounts are your retention engine. Results here buy you the next 12 months of retainer.

LEAD GENERATION

23 "Suggest 10 lead magnet ideas for a [client niche] business that can be delivered automatically through a HighLevel funnel — checklists, calculators, instant quotes, booking offers. Rank by conversion potential and effort to build, and pick the one to launch first."

24 "Write landing page copy for [client offer]: headline, subhead, three benefit blocks, social proof section and form. Keep the form to the minimum fields needed to qualify. Give me two headline directions — one pain-led, one outcome-led."

25 "Create five ad copy variants for [client offer] targeting [audience]: two short punchy versions, two story-led versions, one offer-led with a deadline. Each with three headline options. Flag any claims that need substantiation before running."

NURTURE & REACTIVATION

26 "Design a five-email nurture sequence for leads who downloaded [lead magnet] but didn't book. Each email answers one real objection and ends with the same single CTA: book a [appointment type]. Write subject lines that get opened without tricking anyone."

27 "Build a database reactivation campaign for a [client niche] list of [number] dormant contacts: a three-touch SMS and email sequence with a time-boxed offer. Write the copy, define the segments to exclude, and estimate a realistic response rate range so my client's expectations are set."

28 "Write six variants of missed-call text-back copy for a [client niche] business — friendly, direct and compliant. Each under 160 characters, each ending with a clear next step (book, reply, call back). Include one after-hours variant."

REPUTATION & CONTENT

29 "Create a review request campaign for [client niche]: the trigger moment to send it, SMS and email copy, a polite second ask for non-responders, and a response template for the owner to reply to every review — positive and negative — in under two minutes."

30 "Build a one-month social content calendar for a [client niche] business: 12 posts mixing proof (jobs done, reviews), education and offers. Write the captions in the owner's voice, not agency voice, and note which posts to boost."

STAGE 05

SaaS mode & pricing

Recurring software revenue changes the economics of your agency. Price it deliberately — these prompts do the modeling with you.

PACKAGING

31 "Design three SaaS tiers for reselling my white-labeled platform to [niche]: which features sit in each tier (CRM, two-way texting, calendars, reputation, automations, AI features), monthly price points, and the natural upgrade trigger between tiers. My wholesale costs are [costs]."

32 "Based on these notes about what [niche] clients say they'd pay for and what they currently spend on separate tools [paste notes], build a value-based price for my SaaS offer. Show the tool-replacement math I can use on sales calls."

33 "Should my SaaS offer for [niche] use a free trial, a paid trial or a setup-fee-plus-subscription model? Compare all three for a high-touch local-business audience: activation risk, support load, refund exposure and cash flow. Recommend one and the guardrails to run it with."

34 "Map the upgrade path from my SaaS-only tier to a hybrid SaaS-plus-services offer: which usage signals show a client is ready (lead volume, feature adoption, team size), what the pitch is at each trigger, and how to package 'done for you' on top of 'do it yourself'."

TESTING & ACTIVATION

35 "Create a framework for testing monthly versus annual pricing and flat versus per-location pricing for my SaaS offer. Define the test cells, how long to run each, the minimum signups for a real signal and the metrics that decide the winner."

36 "Design a self-serve onboarding sequence for new SaaS signups: the three actions that predict a client sticks (connect phone number, import contacts, first automation live), and the emails, in-app checklist and human touchpoint that push each one in week one."

37 "My lowest SaaS tier churns at [rate]. Analyze these cancellation reasons [paste data] and recommend five changes — to onboarding, feature gating, pricing or communication — ranked by expected churn impact against effort to implement."

STAGE 06

Retention & reporting

Clients don't leave because results are bad — they leave because they can't see them. Prove value monthly and churn takes care of itself.

PROVING VALUE

38 "Design a monthly client report for [offer] that a busy owner reads in two minutes: the three numbers that matter (leads, booked appointments, revenue attributed), month-over-month movement, what we did, what's next. No vanity metrics."

39 "Create a quarterly business review agenda for [client]: results versus goals, what the data says to double down on, one strategic recommendation for next quarter, and a natural moment to discuss expanding scope. 30 minutes, client talks half the time."

40 "Turn these client results [paste metrics] into an expansion conversation: draft the talking points that connect what's working to the next service tier, the specific ask, and the fallback if they're not ready. No pressure tactics — the numbers make the case."

PREVENTING CHURN

41 "Analyze these notes from clients who cancelled [paste notes] and extract the real reasons behind the stated ones. Suggest five retention initiatives ranked by impact and ease, and identify which cancellations were preventable in the first 60 days."

42 "Build an early-warning system for at-risk clients using signals I can see in HighLevel and my own records: login drop-off, unanswered reports, slower replies, declining lead volume, missed payments. Define three risk levels and the intervention for each."

43 "Write a win-back sequence for clients who cancelled in the last six months: one honest email at 30 days, one at 90 with something new we've shipped, one at 180 with a concrete offer. No guilt, no discounting panic — give them a reason to come back."

44 "Design an automated feedback loop for my client base: when to ask (after onboarding, after a win, at renewal), the two questions that matter each time, and how to route a bad score to me within the hour. Keep every survey under 60 seconds."

STAGE 07

Scaling operations

Growth that depends on you working more hours isn't growth. Systemize, delegate and measure — in that order.

SYSTEMS & TEAM

45 "Here's everything I did last week, hour by hour [paste log]. Identify what should be automated in HighLevel, what should be delegated, what should be templated and what should stop entirely. Estimate hours recovered per week for each change."

46 "Turn this recording transcript of me doing [task] [paste transcript] into a step-by-step SOP a new hire can follow without asking questions: numbered steps, screenshots to capture, common mistakes and the definition of done."

47 "Write a role scorecard for my first [role — VA, account manager, appointment setter]: mission, five outcomes with numbers attached, the competencies that matter, and three interview questions per competency that surface real evidence, not rehearsed answers."

GROWTH LEVERS

48 "Based on these agency metrics [paste MRR, client count, churn, CAC, capacity], suggest five growth experiments for next quarter. For each: hypothesis, cost, time to signal and the kill criteria. Tell me which one to run first and why."

49 "Create a framework for finding and evaluating partnership opportunities for my agency — referral partners who serve [niche] (bookkeepers, suppliers, associations), white-label arrangements and co-marketing. Include evaluation criteria and the first outreach message for each type."

50 "Design the KPI dashboard for my agency: the leading indicators (discovery calls booked, proposals out, onboarding velocity) and lagging ones (MRR, net churn, revenue per client). Define each metric precisely, set a review cadence, and flag the two numbers I should check every Monday."

BEFORE YOU CLOSE THIS

Getting the most from these prompts

Fifty prompts won't grow your agency — using five of them this week will. Pick the stage you're stuck at, run its prompts with your real data, and ship whatever comes out. Then come back for the next stage.

Four rules worth keeping

Validate against clients, not vibes. AI suggestions are hypotheses; your discovery calls and dashboards are the data.

Adapt to your context. A prompt tuned for med spas won't fit roofers unchanged. Swap the brackets, keep the structure.

Treat outputs as drafts. The AI writes the first 80% — the last 20% is your judgment, and it's the part clients pay for.

Save what works. When a refined prompt nails your niche, save it. Your prompt library becomes an agency asset.

Nexus HUB

Stuck on any of this? That's what Nexus Hub is for

Nexus Hub is the community for HighLevel agencies ready to scale, optimize and connect — founded by Charles Higgins of Pinnacle Ai. Bring your stuck point, leave with a plan.

- Weekly Q&A sessions with experts who run agencies
- Exclusive snapshots and templates, ready to deploy
- Premium partner deals on the tools you already buy
- A private community and comprehensive training

Join Nexus

Where HighLevel agencies get unstuck.

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