

PROMPT LIBRARY · 42 PROMPTS

The agency transformation prompt library

42 AI prompts to get you out of the operator trap — from mindset and positioning through systems, team, revenue and finances, to an agency that runs without you in it every day.

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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. This library is about your agency, not your clients' campaigns: if you're drowning in operations, can't step away without things breaking, or can't explain what makes your agency different, start here.

1 Fill every bracket honestly

These prompts only work on real data — your actual task list, real client numbers, the dependencies you'd rather not admit. Vague inputs produce generic outputs.

2 One prompt at a time

Implement each output before running the next prompt. Depth beats breadth — 5 prompts fully applied transform more than 42 skimmed.

3 Build a playbook as you go

Store every output, refinement and decision in one master document. Six months in, that document is your agency's operating manual.

4 Block the time

2–3 hours weekly, protected. This is working ON the business — the first thing the operator trap steals from you.

Mindset and role transformation

You can't systemize your way out of a role you haven't decided to leave. These five prompts make your operator habits visible and measurable — the mental groundwork everything else builds on.

PROMPT 01 Operator vs owner assessment

Track one real week first — the honest version, including the 40 minutes you spent fixing a client's workflow yourself.

Act as a business operations consultant specializing in agency growth. Analyze my current role to identify where I'm functioning as an operator versus an owner. I'll provide my task list from last week. Classify each task as "operator work" (doing), "manager work" (overseeing) or "owner work" (strategy and system building), then give me a 30-day action plan to shift at least 40% of my operator tasks to other categories. My task list with time estimates: [insert detailed task list]

PROMPT 02 Expertise trap analysis

For when clients specifically ask for you — the flattering problem that caps your growth.

You are an agency consultant who helps founders escape the expertise trap. I'm the go-to person for [specific skill/service] in my agency and clients request me by name. Create a systematic approach to transfer this expertise to my team without losing quality or client confidence. Include: 1) a documentation template for my methodology, 2) a training progression plan, 3) client communication scripts for introducing team members, 4) quality checkpoints that don't require my personal review. What makes my approach unique: [describe your methodology and what clients value]

PROMPT 03 Time audit and reallocation

Every recurring activity gets a verdict: automate, delegate, eliminate or systemize.

Act as a productivity strategist for agency owners. I want to move from working IN my agency to working ON it. Analyze my weekly schedule and create a reallocation plan that progressively reduces my operational involvement over 90 days. For each activity, suggest: automation (we run on HighLevel — flag anything a workflow could do), delegation with role assignment, elimination or a system that reduces my involvement. My typical weekly activities with hours: [insert schedule]

PROMPT 04 Decision-making frameworks

If every pricing exception and scope question routes through you, you're the bottleneck by design.

You are a strategic business advisor. Create decision-making frameworks that let my team decide without my input for these recurring decision types: [list frequent decisions — pricing exceptions, scope changes, client requests, quality issues]. For each: clear evaluation criteria, boundary conditions for escalation, a checklist or decision-tree format and a worked example. My typical decision context: [describe decision factors]

PROMPT 05 Bottleneck identification

Walk through one project sale-to-delivery and count how many times it waits on you.

Act as an operations efficiency expert. Identify where I create bottlenecks in my agency's workflow. I'll describe our project process from sale to delivery — analyze each stage and pinpoint where my involvement causes delays, limits capacity or blocks scaling. For each bottleneck: root cause, immediate workaround, medium-term system fix and long-term structural change. Our current workflow: [describe end-to-end process with your involvement points]

Positioning and niche selection

"We do marketing for local businesses" is not a position — it's a commodity. Niching is also the unlock for the HighLevel model: one niche means one snapshot, one funnel library and one sales script that work for every client.

PROMPT 06 Profitable niche identification

Let your last 20 clients tell you where the money already is.

You are a market positioning strategist for agencies. Analyze my client history to identify my most profitable and sustainable niche. For my last 20 clients I'll provide: industry, project type, revenue, margin, time to close, duration and satisfaction. Identify patterns, recommend my ideal niche with supporting data, then write a positioning statement: "We help [specific audience] achieve [specific outcome] through [unique method]." My client data: [insert client portfolio breakdown]

PROMPT 07 Service suite optimization

Fewer services, delivered through repeatable systems, beat a menu of one-offs.

Act as a business strategist specializing in agency service optimization. Review my services and recommend which to keep, improve or kill based on strategic fit and profitability. For each I'll provide: monthly revenue, margin, delivery time, team expertise, demand and competition. Design a streamlined suite that maximizes operational efficiency — favor services we can productize and deliver through repeatable systems. My current services: [list services with metrics]

PROMPT 08 **Competitive differentiation**

Every HighLevel agency has the same tools. The differentiation is in method and proof.

You are a competitive intelligence analyst. Identify what truly differentiates my agency from competitors in [your market/niche] — keeping in mind many rivals use the same software stack we do, so the difference must be method and results, not tools. Analyze my approach against common competitor offerings, define my unique value proposition, then craft 3 positioning angles targeting different client pain points, each with a messaging framework. What we do and how: [describe methodology, case studies and approach]

PROMPT 09 **Ideal client profile**

The qualification questionnaire at the end becomes a form on your booking funnel.

Act as a customer research specialist. Create a detailed ideal client profile beyond demographics: business characteristics, decision process, budget expectations, project triggers, success metrics they value and red flags indicating poor fit. Then create a qualification questionnaire for sales conversations. My 5 best client relationships and what made them work: [describe your best clients]

PROMPT 10 **Value proposition testing**

Test the variations as funnel headlines and ad copy — real clicks are the vote that counts.

You are a conversion optimization expert. Help me test and refine my value proposition. I'll provide my current positioning statement and website copy. Create 5 value proposition variations, each emphasizing a different benefit or approach. For each: the psychological trigger, the client segment it fits, how to test it in real campaigns and the metrics to track. My current messaging: [insert positioning statement and key copy]

Systems and process development

Systems are how you clone yourself. Document one core process at a time, test it with your team, then move the mechanical parts into HighLevel workflows. (For a deeper dive, grab our SOP prompt pack — this section covers the essentials.)

PROMPT 11 Core process mapping

Start with the process that hurts most — usually onboarding or delivery.

Act as a business process consultant. Guide me through documenting one of my agency's core processes end to end: [specific process — client onboarding, campaign delivery, reporting]. Identify: inputs and triggers, every step in sequence with responsible parties, decision points, quality checkpoints, outputs and completion criteria, and tools required. Ask clarifying questions to capture the complete process. High-level description: [describe the process]

PROMPT 12 SOP template creation

Detailed enough for a new VA, short enough to actually get used.

You are an operations manual expert. Create a comprehensive SOP template for documenting any process in my agency. Include: purpose and scope, required tools and access, step-by-step instructions with decision trees, quality standards, troubleshooting, version history and approval workflow. Make it specifically relevant to a [your agency type] running on HighLevel.

PROMPT 13 Quality control system

Multi-layered QC is what lets you stop reviewing everything personally.

Act as a quality assurance specialist. Design a multi-layered quality control system for my agency that maintains standards without my personal review of everything: automated checkpoints, peer review protocols, client approval stages and final verification. Cover these services: [list main services]. For each layer: what gets checked, who checks it, pass criteria and escalation. Our quality standards: [describe expectations]

PROMPT 14 Automation opportunity assessment

You're paying for an automation platform — this finds what you're still doing by hand.

You are a business automation consultant. Analyze my agency's operations for high-value automation opportunities. We run on HighLevel, so prioritize what its workflows, triggers, pipelines and scheduled reports can handle before suggesting new tools. Rank opportunities by time saved, error reduction, complexity and cost; for the top 5 give implementation steps and estimated ROI. Our manual processes and current stack: [describe workflows and tools]

PROMPT 15 Project management setup

Nothing falls through the cracks, without drowning the team in process.

Act as a project management implementation specialist. Design a PM system for my agency of [number of people] handling [describe typical projects]. Recommend: platform configuration, workflow templates per project type, notification and escalation rules, reporting dashboards and a team adoption strategy. Our current PM pain points: [describe challenges]

PROMPT 16 File and asset management

Client logos, ad creatives, snapshots, SOPs — findable by anyone, versioned properly.

You are a digital asset management expert. Create a file organization system for my agency: folder hierarchy, naming conventions, version control, access permissions, backup procedures and onboarding documentation. Include a structure for client assets, campaign creatives and our snapshot/template library. Current issues: [describe challenges]. We store files in: [your storage systems]

PROMPT 17 **Client communication framework**

Most templates here can become automated workflow emails — informed clients churn less.

Act as a client experience designer. Develop a systematic communication framework that keeps clients informed without my constant attention. Create templates and schedules for: kickoff, progress updates, milestones, delay notifications and wrap-ups. Include frequency guidelines, channel selection (email vs call vs meeting), escalation triggers and personalization that keeps the human touch. Flag which templates can be automated. Typical project duration: [timeframe]. Clients most often worry about: [common concerns]

Team building and leadership

Systems without people to run them are just documents. These prompts cover hiring in the right order, delegating without losing quality and building a team that solves problems instead of forwarding them to you.

PROMPT 18 Strategic hiring roadmap

Hire against revenue milestones, not against panic.

You are a talent acquisition strategist for agencies. Create an 18-month hiring plan. Current team: [describe size and composition]. Revenue: [amount], projected: [amount]. Bottlenecks: [describe capacity constraints]. Recommend: roles in priority order, job descriptions, timing tied to revenue milestones, salary ranges and whether each should be full-time, part-time or contract.

PROMPT 19 Job description and success metrics

30/60/90-day metrics turn "we'll see how it goes" into a real onboarding plan.

Act as an HR consultant specializing in agencies. Create a comprehensive job description for a [specific role]: role purpose and mission fit, responsibilities and deliverables, required vs preferred qualifications, 30/60/90-day success metrics, reporting structure and growth trajectory. Our agency focuses on [your niche] and this role must [primary function]. Key objectives: [describe what this person must accomplish]

PROMPT 20 Delegation framework

For the task you've tried to hand off twice and taken back both times.

You are a leadership coach specializing in delegation. Create a systematic framework for handing off [specific responsibility] without losing quality or control: task documentation and success criteria, training plan and timeline, progressive responsibility levels, quality checkpoints and feedback loops, escalation procedures and confidence-building milestones. This is hard to delegate because: [explain concerns or past failures]

PROMPT 21 Meeting structure

Aligned without over-meeting — especially for remote and contractor-heavy teams.

Act as an organizational effectiveness consultant. Design an efficient meeting structure for my agency of [number] people across [roles]: weekly team meeting agenda with time allocations, daily standup format if appropriate, monthly strategic review, one-on-one framework and quarterly planning. Include facilitation tips. Our current meeting problems: [describe issues]

PROMPT 22 Performance review system

Continuous feedback beats the annual surprise review.

You are an HR systems designer. Create a fair, motivating performance review system for my agency: performance criteria tied to role expectations, regular feedback cadence, self-assessment, peer feedback, goal tracking and compensation linkage. Size: [your agency size]. Roles: [list team roles]. Our culture values: [describe values and work style]

PROMPT 23 Ownership culture development

From "what should I do?" to "here's what I did and why."

Act as an organizational culture consultant. Help me transform my team from task-completers to owner-minded problem-solvers. Create a 6-month plan: decision-making authority frameworks, problem-solving training, recognition systems for ownership behavior, communication practices that encourage initiative and metrics to measure the shift. Behaviors I want to change: [describe dependent behaviors]. Behaviors I want to cultivate: [describe desired behaviors]

PROMPT 24 Cross-training program

If only one person can build workflows or run reports, that's a single point of failure.

You are a training and development specialist. Design a cross-training program that removes single points of failure in my agency. Team: [number] people with these primary skills: [list members and specialties]. The program should: identify critical knowledge needing redundancy, pair members for skill sharing, structure learning time without disrupting client work, validate transfer through practice and document institutional knowledge. Our biggest vulnerability: [describe key person dependencies]

Revenue and sales systems

Feast-or-famine revenue is a systems problem, not a sales-talent problem. Build the machine: predictable lead flow, a documented sales process and retention that compounds. Practice what you preach — your own agency should be your best-run HighLevel account.

PROMPT 25 Lead generation system

3–4 complementary channels, each feeding your own pipeline and nurture workflows.

Act as a B2B lead generation strategist. Design a multi-channel lead generation system for my agency serving [target market] with [your services]. Ideal clients: [describe]. Include: 3–4 complementary channels, content strategy per channel, qualification criteria, nurture sequence design, budget allocation and success metrics. Current challenges: [describe your situation]

PROMPT 26 Content marketing calendar

90 days of authority-building content, batched and scheduled through Social Planner.

You are a content marketing expert for professional services. Create a 90-day content calendar to attract [your target audience] and position us as experts in [your specialty]. For each piece: topic and angle, format, distribution channels, SEO terms, CTA and repurposing opportunities. Our expertise: [list competencies]. Topics our ideal clients care about: [list pain points]

PROMPT 27 Sales process documentation

Map every stage to a pipeline stage so close rates become visible per step.

Act as a sales process consultant. Document and optimize my agency's sales process from first contact to signed contract: qualification criteria, discovery framework, proposal process, presentation practices, objection handling, negotiation boundaries and contract steps. For each stage: typical duration, success metrics, required materials and common failure points. Our cycle takes [timeframe] with a close rate of [percentage]. Common objections: [list objections]

PROMPT 28 **Modular proposal system**

Assemble proposals in 20 minutes instead of writing them in 3 hours.

You are a proposal writing specialist. Create a modular proposal system so my team can assemble customized proposals quickly: executive summary template with client variables, service description modules, case study selection criteria, pricing presentation options (packages vs custom), timeline sections and standard terms. Our proposals fail when: [describe rejection reasons]. Our best proposals win because: [describe winning patterns]

PROMPT 29 **Referral system**

Happy clients refer when asked at the right moment — automate the asking.

Act as a referral marketing expert. Design a systematic referral program that turns satisfied clients into consistent lead sources: timing strategy for asks, request scripts, incentive structure if appropriate, source tracking, follow-up process for referred leads and thank-you protocols. Clients most commonly refer us to: [describe typical connections]. Barriers we've noticed: [describe why clients don't refer]

PROMPT 30 **Pricing strategy optimization**

Most agencies underprice. Include your recurring/SaaS revenue in the analysis.

You are a pricing strategist for professional services. Optimize my pricing for profit and competitiveness. Current pricing: [describe structure and rates, including any recurring software/SaaS fees you charge]. Analyze positioning implications, margins by service, price sensitivity, competitive landscape and value-based opportunities. Recommend: new structure with justification, tiers or packages, how to present pricing and how to raise prices with existing clients. Target margin: [percentage]

PROMPT 31 Client retention system

A point of churn prevented is worth more than a point of acquisition gained.

Act as a customer success consultant. Design a proactive retention system: early warning indicators for at-risk clients, touchpoint schedule beyond project work, value reinforcement, upsell identification, satisfaction measurement and a win-back campaign for churned clients. Current retention: [percentage]. Common churn reasons: [list reasons]. Our stickiest clients look like: [describe them]

Financial management and metrics

Revenue is vanity; margin and cash flow decide whether you sleep. Visibility first, optimization second, planning third.

PROMPT 32 Financial dashboard design

10–12 numbers reviewed weekly beat a monthly P&L you never open.

You are a financial analyst specializing in agency metrics. Design a simple weekly financial dashboard for an agency of my size [revenue and team size]: revenue and growth metrics, profitability, cash flow, client health (including MRR and churn) and operational efficiency ratios. For each metric: calculation, target range, review frequency and the action to take when it's out of range. Our visibility challenges: [describe issues]

PROMPT 33 Client profitability analysis

Your biggest client by revenue may be your worst by margin. Find out.

Act as a profitability consultant. Create a framework for true client profitability beyond revenue: direct labor by client, PM overhead, revision and scope-creep costs, payment terms impact, opportunity cost and strategic value. Design a scoring spreadsheet, then help me interpret it: when to raise prices, when to fire a client, when to invest more. My top 10 clients by revenue: [provide client data]

PROMPT 34 Cash flow forecasting

13 weeks forward is far enough to act, close enough to be accurate.

You are a cash flow management expert. Create a 13-week cash flow forecasting system for my agency: template for inflows and outflows, methodology for estimating payment timing, expense forecasting by category, best/worst-case scenarios and alert triggers. Help me determine my needed cash reserve, expected seasonal patterns and strategies to smooth volatility. Our cash flow patterns and concerns: [describe]

PROMPT 35 **Service pricing analysis**

Calculates the hourly rate you're actually earning per service. Brace yourself.

Act as a pricing analyst. Analyze my service pricing against costs and market rates. I'll provide: pricing per service, delivery hours, labor rates, overhead allocation and competitive data. Calculate true margins, implied hourly rates, underpriced vs overpriced services and elasticity opportunities. Recommend specific adjustments with timing and client communication strategy. My pricing and cost data: [provide details]

PROMPT 36 **Budget planning framework**

A budget with decision triggers, so mid-year adjustments are rules, not panic.

You are a financial planning consultant for agencies. Create an annual budget supporting growth and profitability. Current revenue: [amount], growth target: [percentage]. Allocate across: team costs, marketing and business development, technology and tools, operations, professional development and owner compensation. Include monthly breakdown, variance tracking and decision triggers for mid-year adjustments. Current expense structure: [provide major categories and amounts]

Operational autonomy

The final test: how long can you be away before something breaks? These prompts systematically remove you from daily operations — the two-week vacation is the milestone that proves it worked.

PROMPT 37 Business autonomy assessment

A scored baseline across 7 areas — rerun it quarterly to track progress.

Act as an operational excellence consultant. Evaluate how well my agency functions without my daily involvement. Score autonomy in: daily operations, client communication, quality control, financial management, team leadership, sales and strategic planning. For each area: what currently requires me, quick wins, medium-term system improvements and long-term structural changes. How our operations currently work: [describe operational reality]

PROMPT 38 Emergency protocols

Crises handled by protocol instead of by calling you.

You are a business continuity specialist. Create emergency protocols so my team handles crises without me. Emergencies to cover: [list — missed deadlines, client complaints, team absences, technical failures like a broken automation or a down funnel, scope disputes]. For each: severity classification, immediate response steps, decision authority levels, client communication templates, escalation and post-incident review. Past emergencies handled poorly: [describe]

PROMPT 39 Vacation preparation checklist

Two weeks off, no emergencies. Book the trip first — deadlines create systems.

Act as an operations manager preparing a business owner for extended absence. Create a comprehensive checklist for a 2-week vacation without business emergencies: preparation timeline from 6 weeks out, team briefing and documentation, client communication strategy, authority delegation by decision type, check-in protocol (if any), emergency contacts and re-entry process. Operations that most depend on me: [describe dependencies]

PROMPT 40 Leadership transition planning

Not about exiting — about exposing every dependency you should eliminate anyway. Also what makes an agency sellable.

You are a succession planning consultant. Even though I'm not exiting soon, create a leadership transition plan that would let my agency continue under different leadership: key person risk assessment, knowledge documentation priorities, leadership development pathways, decision authority transition, client relationship transition and operational continuity. If I couldn't be involved for 6 months, these things would fail: [list critical dependencies]

PROMPT 41 Decision delegation framework

Written authority levels with spending limits — ambiguity is what sends everything back to you.

Act as a management consultant. Create clear decision-making authority levels for my agency: client-facing decisions (pricing, scope, deadlines), operational (process changes, tool selection), financial (spending limits), HR (hiring, raises) and strategic (positioning, services, markets). For each category: authority levels, spending limits where applicable and escalation rules. Decisions that currently flow through me: [list them]

PROMPT 42 Quarterly business review

The owner's operating rhythm once you're out of the day-to-day.

You are a strategic planning facilitator. Design a quarterly business review that keeps my agency on track without getting lost in daily operations: agenda with time allocations, preparation materials, analysis frameworks (financials, clients, team, operations, market), goal-setting methodology, prioritization and action tracking. Include facilitation questions that drive real discussion. Our strategic goals for next year: [describe major objectives]

The 42-week roadmap

Don't work through all 42 prompts at once — that's analysis paralysis with extra steps. Follow the phases in order; each builds on the last.

WEEKS 1–4 **Foundation.** Mindset prompts (1–5). One every few days, implemented before the next. Document insights in your master playbook.

WEEKS 5–8 **Strategic clarity.** Positioning prompts (6–10). Update your website, funnels and sales conversations from the outputs.

WEEKS 9–16 **Systems.** Process prompts (11–17), starting with your most painful bottleneck. One process at a time: document, test, refine, automate.

WEEKS 17–24 **Team.** Leadership prompts (18–24). Role clarity and accountability systems before new hires, not after.

WEEKS 25–30 **Revenue.** Sales prompts (25–31): lead generation foundation, then sales process, then retention and referrals.

WEEKS 31–36 **Financial mastery.** Money prompts (32–36): visibility first, then optimization, then planning.

WEEKS 37–42 **Independence.** Autonomy prompts (37–42). Test your systems with progressively longer periods away.

Measuring progress

Review monthly: share of time on owner vs operator work, positioning you can state in one sentence, processes documented and delegated, decision types your team handles alone, consistency of new-client acquisition, margin and cash reserve growth, and the longest stretch you've been away without an issue.

WHEN YOU'RE STUCK

"The outputs feel generic" — add more specific context. "I'm overwhelmed" — implement one thing fully before the next prompt. "My team ignores the new systems" — that's a culture problem; revisit prompts 20–23. "I don't have time for this" — that's the operator trap talking. Start with 30 minutes a week, or bring the stuck point to a Nexus Hub Q&A.



THIS PACK IS JUST THE START

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