
The chatbot deployment playbook

28 AI prompts for HighLevel agencies that sell, build and scale website chatbots — for your clients and your own site.

Do you handle emergency calls after hours?

We do — want me to book you in right now?

2:47 AM — ANSWERED IN 3 SECONDS

A chatbot is a service line, not a widget

Every local business you serve is losing leads to slow replies — after hours, on weekends, mid-job. A website chatbot built in HighLevel fixes that, and it's one of the cleanest recurring-revenue services an agency can sell: high perceived value, snapshot-repeatable delivery, measurable results.

This playbook gives you 28 prompts to run with an AI assistant. Each one extracts specific, client-ready output — audits, flows, pricing, reports. The [\(blue text in parentheses\)](#) is where you paste your client's real details. The more context you give, the sharper the output.

TIP 01

Work in sequence — each chapter's output feeds the next, from pitch to report.

TIP 02

Save every response in a client doc — it becomes your proposal, SOP and training data.

TIP 03

Ask follow-ups. The first answer is a draft; two refinements make it client-ready.

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Qualify the opportunity

Prove the case with the client's own numbers before you pitch a build.

PROMPT 01 Client service audit

Act as a customer service analyst. Help me evaluate whether a website chatbot would benefit my client's business. Here's what I know: (their most common inbound questions, current response times, business hours vs when leads actually reach out, and missed-call volume from their HighLevel reporting). Assess which inquiries a bot should automate, which should stay human, and the strongest data points to use in my pitch.

PROMPT 02 Time-cost analysis

Act as a business efficiency consultant. Calculate what my client loses answering repetitive questions manually: (hours per week spent on repeat questions, staff hourly cost, peak inquiry times and after-hours lead volume). Break down the potential time savings and the revenue impact of instant response — in numbers I can put straight into a proposal.

PROMPT 03 Customer-fit analysis

Act as a consumer behavior specialist. Analyze whether my client's customer base will respond well to a chatbot: (typical customer age range, technical comfort level, purchase complexity and service expectations). Tell me whether this audience will embrace or resist bot interactions, and how to position the rollout to maximize acceptance.

PROMPT 04 Customer journey mapping

Act as a customer experience strategist. Map where a chatbot creates the most value in my client's funnel: (the typical path from ad or Google Business Profile to booked appointment, including the drop-off points already visible in their HighLevel pipeline). Identify the exact stages to deploy the bot first and what it should do at each one.

Scope the build in HighLevel

Decide exactly what you're building before you open the sub-account.

PROMPT 05 Conversation AI vs workflow bot

Act as a HighLevel implementation specialist. Help me choose between HighLevel's Conversation AI and a rule-based workflow bot for this client: (business type, common questions, budget, and how much of each conversation must end in a booked call). Compare both for this exact use case — training effort, cost per message, control, calendar booking — and give me a clear recommendation.

PROMPT 06 Feature prioritization

Act as a product manager specializing in chatbot solutions. Prioritize features for this build based on the client's goals: (their top three business objectives, service pain points and retainer budget). Rank features — FAQ answers, lead capture, calendar booking, missed-call text-back, pipeline updates — by impact on those objectives, and flag what belongs in phase two.

PROMPT 07 Sub-account integration map

Act as a systems integration specialist. Map how the chatbot should connect to the rest of the client's HighLevel sub-account: (their calendars, pipelines, existing workflows, custom fields and any third-party tools). Show me where bot conversations should create contacts, fire workflows, update opportunities and tag leads — and any gaps to fix before launch.

PROMPT 08 ROI projection

Act as a business investment analyst. Project the ROI of this chatbot deployment: (current cost per lead, average customer value, monthly website traffic, close rate, my setup fee and monthly retainer). Build a projection with a break-even timeline and the three metrics I should show the client each month to prove the number.

Build and launch

From blank widget to live bot without burning the client relationship.

PROMPT 09 Conversation flow design

Act as a conversation design specialist. Design the full conversation flow for my client's most common inquiry: [\(the question, its common variations and follow-ups, and the goal — answer, qualify or book\)](#). Map decision points, responses and the handoff to a HighLevel calendar or human agent, structured so I can build it directly as workflow steps.

PROMPT 10 Bot training data

Act as a knowledge management expert. Turn my client's FAQ into Conversation AI training material: [\(their top 10 customer questions with current answers\)](#). Rewrite each into concise bot-ready Q&A pairs, group related intents, and list the additional questions customers will predictably ask that we should train before launch.

PROMPT 11 Script-to-dialogue translation

Act as a conversational AI designer. Convert my client's customer service scripts into chatbot dialogue: [\(2–3 examples of how their team answers common inquiries today\)](#). Rewrite them shorter and more conversational for chat while keeping the brand voice and every key fact intact.

PROMPT 12 Phased launch plan

Act as a digital product launch strategist. Build a phased go-live plan that minimizes risk: [\(site traffic patterns, customer segments, seasonality and my agency's capacity\)](#). Define what ships in week one, the metrics that gate each expansion, and the fallback if the bot misfires — including when a human takes over the conversation inbox.

Bot content that converts

Make the bot sound like the brand and sell like your best closer.

PROMPT 13 Brand voice translation

Act as a brand communications specialist. Translate my client's brand voice into bot copy: (brand personality, values, target audience and samples of their current marketing copy). Write the greeting message, three response templates and an away message that sound unmistakably like them while staying short enough for chat.

PROMPT 14 Welcome message tests

Act as a conversion optimization expert. Write three alternative welcome messages to test on my client's site: (site purpose, target audience and primary conversion goal). Make each take a distinct approach — helpful, direct offer, curiosity — explain the psychology behind each, and tell me how to split-test them cleanly.

PROMPT 15 Lead qualification paths

Act as a lead generation specialist. Design the qualification questions the bot asks before booking: (ideal customer profile, deal size, qualification criteria and the HighLevel custom fields available). Build question paths that filter tire-kickers without adding friction, and map each answer to a field, tag or pipeline stage.

PROMPT 16 Escalation to human

Act as a customer experience consultant. Design the bot-to-human handoff: (the client's support channels, staffed hours and the inquiries too complex for the bot). Write the handoff scripts and define the workflow — internal notification, conversation assignment, response SLA — so no lead dies in the transition.

Optimize and report

Keep the bot improving and prove the retainer every month.

PROMPT 17 Metrics framework

Act as a business analytics specialist. Define the metrics that matter for this chatbot: [\(the client's goals, service standards and what HighLevel reporting exposes\)](#). Give me a tight KPI set — engagement rate, lead capture rate, booking rate, containment — with benchmarks and exactly where to pull each number from the sub-account.

PROMPT 18 Conversation review process

Act as a conversation intelligence analyst. Build a review process for bot transcripts: [\(bot platform, client goals and key customer segments\)](#). Define the patterns to flag — dead ends, repeated rephrasing, drop-offs before booking — how to categorize them, and how to rank fixes by revenue impact rather than volume.

PROMPT 19 A/B testing plan

Act as a conversion rate optimization specialist. Design an A/B testing plan for the bot: [\(current setup, conversion goals and monthly traffic volume\)](#). Tell me what to test first — opener, qualification order, booking prompt — with sample-size guidance that's realistic for this traffic, and how to run each test without contaminating results.

PROMPT 20 Client-facing report

Act as a business reporting specialist. Create a monthly chatbot report template for my client: [\(the metrics I track, what the client cares about and how skeptical they are of automation\)](#). Structure a one-page report that leads with revenue outcomes, shows what we improved this month, and sets up the next upsell conversation.

Productize and sell it

Turn one good build into a repeatable, recurring service line.

PROMPT 21 Package and pricing design

Act as an agency pricing strategist. Package chatbot deployment as a productized service: (my delivery costs, hours per build, market and competitors, and my existing retainer structure). Design a setup fee plus monthly retainer tiers, what each tier includes, and where Conversation AI usage costs sit so my margin survives at scale.

PROMPT 22 Audit-first pitch

Act as a sales strategist. Build an audit-first pitch for my chatbot service: (my niche, a prospect's current website and response times, and how they handle leads today). Script a short "response time audit" offer that exposes the gap with their own numbers, and the follow-up pitch that converts the audit into a paid deployment.

PROMPT 23 Snapshot productization

Act as a HighLevel operations expert. Help me turn my best chatbot build into a reusable snapshot: (everything the build includes — workflows, custom fields, calendars, pipelines, bot configuration). List what to genericize with custom values, what must be rebuilt per client, and a deployment checklist that gets a new sub-account live in under a day.

PROMPT 24 Client onboarding SOP

Act as an operations consultant. Write the client onboarding SOP for a chatbot deployment: (my intake process, what I need from clients — FAQ, brand voice, calendar access — and my team's roles). Produce a step-by-step SOP with an owner, timeline and client touchpoint for every stage from signed proposal to live bot.

PROMPT 25 Agency-site bot strategy

Act as an agency growth strategist. Design the chatbot for my own agency website: [\(my services, ideal client profile, how leads currently reach me and my booking calendar setup\)](#). Define what the bot should do — qualify niche and budget, answer service questions, book discovery calls — and what would make it the strongest possible demo of my work.

PROMPT 26 Demo bot as sales asset

Act as a sales enablement specialist. Turn my website bot into a live demo for prospects: [\(my sales process, common objections and the client results I can show\)](#). Script how I walk a prospect through my own bot mid-call, which moments to highlight, and the transition line that moves us from demo to proposal.

PROMPT 27 Capture-to-booked flow

Act as a conversion architect. Design my agency bot's capture-to-booked flow end to end: [\(my qualification criteria, calendar setup, pipeline stages and follow-up workflows\)](#). Map the full path from first message to booked discovery call — including the nurture workflow that fires when a visitor engages but doesn't book.

PROMPT 28 Case study documentation

Act as a business case study writer. Turn my best chatbot deployment into a case study: [\(the client, the before-state, what we built and the results after 60–90 days\)](#). Structure it problem–build–result with the specific numbers to feature, plus a short version my own site's bot can reference when prospects ask for proof.

The 30-day deployment sprint

First client, first bot, first report — one focused month. Each week points to the prompts that do the heavy lifting.

WEEK 1 **Qualify and pitch**

Run the audit on one client ([01–04](#)), build the ROI case ([08](#)) and pitch it audit-first ([22](#)). Goal: signed proposal.

WEEK 2 **Scope and build**

Choose Conversation AI or workflow bot ([05–07](#)), design flows and training data ([09–11](#)), write the bot copy ([13–16](#)). Goal: bot working in staging.

WEEK 3 **Launch**

Test internally, go live phased ([12](#)), watch the conversation inbox daily and fix dead ends as they appear. Goal: live bot, escalation working.

WEEK 4 **Optimize and report**

Review transcripts ([17–19](#)), send the first client report ([20](#)). Goal: proof the retainer pays for itself.

THEN **Scale it**

Snapshot the build, price the package, add it to your own site ([21–28](#)). One deployment becomes a service line.



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