FREE MEMBER RESOURCE

A PLAYBOOK FOR HIGHLEVEL AGENCIES

The agency SaaS blueprint

Turn your HighLevel agency into a productized software business — pick a niche, validate the offer, launch SaaS mode and build recurring revenue that compounds.

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Introduction

You already run the hard part of a software company. This chapter shows you why the next stage of your agency isn't more clients — it's a product.

Picture a Monday you'd actually look forward to. No fire drills from a client who "just doesn't feel the ads are working." No scope creep eating your weekend. Instead, a dashboard: 74 accounts, each paying you every month for software that runs whether you're at your desk or not.

That's not a fantasy business. It's what hundreds of HighLevel agencies have already built by switching from selling hours to selling a product. You have the platform, the license and — if you've run an agency for more than a year — the market insight. What most agency owners are missing is a repeatable process for turning that insight into a productized SaaS offer people actually buy.

This book is that process.

The problem with the agency model

Client services scale linearly at best. Every new retainer brings new meetings, new deliverables and new ways to churn. You're trading expertise for time, and time is capped. Raise prices and you buy yourself margin, not leverage. The ceiling stays exactly where it was.

Software breaks that ceiling. A niche SaaS built on HighLevel — a CRM, booking and follow-up system packaged for one specific industry — costs roughly the same to serve at 10 accounts as at 200. Churn drops because businesses don't rip out the system that runs their pipeline. And unlike a retainer, the product keeps earning while you sleep, travel or build the next one.

Why HighLevel agencies have an unfair advantage

Traditional SaaS founders spend 12–18 months and six figures building a product before they earn their first dollar. You don't. Your unfair advantages:

- **The product already exists.** HighLevel gives you CRM, funnels, calendars, two-way messaging, reputation management and automation — white-labeled under your brand, on your domain, at your price.
- **You know a market from the inside.** Every client you've served has shown you exactly where an industry bleeds time and leads. That knowledge is the expensive part of product development, and you already have it.
- **Snapshots make it repeatable.** Build the perfect setup for one roofer, save it as a snapshot and deploy it to the next hundred roofers in minutes.
- **SaaS mode handles the boring parts.** Self-serve signup, automated billing, plan tiers and usage rebilling are built in. No Stripe integrations to code, no billing engineer to hire.

What this book covers

The blueprint runs in the order the work should happen. First you'll pick a niche you can own (chapter one) and dig into the problems that niche will pay to make disappear (chapter two). Then you'll validate the offer with real prospects before building anything (chapter three) and sharpen it into a value proposition that sells itself (chapter four). Chapter five covers the build — snapshots, SaaS mode configuration, white-labeling and what to outsource. Chapter six handles pricing: tiers, trials and rebilling margins. Chapter seven pulls it together into a 30-day action plan.

One warning before we start: the biggest mistake agencies make with SaaS mode is flipping it on and selling "a CRM" to everyone. Generic tools compete with HighLevel itself, with HubSpot and with a hundred other funded companies. Niche products compete with nobody. Everything in this book flows from that single idea — go narrow, go deep and own a corner of the market that the giants can't be bothered to serve.

Let's get you unstuck.

Finding your perfect SaaS niche

The agencies winning with SaaS mode aren't selling software to everyone. They're selling one system to one industry — and owning it.

HighLevel hands every agency the same toolkit. What separates a $2K/month side project from a $50K/month SaaS is not the tools — it's who you point them at. Before you configure a single snapshot, you need to choose the market you're going to serve, and the right choice is almost always narrower than feels comfortable.

Why niche beats broad every time

Sell "a CRM for small businesses" and you're competing with HighLevel's own marketing, HubSpot's free tier and every other agency that flipped on SaaS mode last month. Sell "the booking and follow-up system for med spas" and you're competing with almost nobody. Going narrow gives you three compounding advantages:

- **Less competition.** Big SaaS companies need markets of millions to move their numbers. A vertical of 30,000 businesses is invisible to them — and more than enough to support you.
- **Fierce loyalty.** When your product speaks their language — their appointment types, their compliance rules, their seasonal rhythms — switching to a generic tool feels like a downgrade. Churn falls and referrals rise.
- **Speed.** One industry means one snapshot, one onboarding flow, one set of marketing messages. You ship improvements faster because every customer needs the same thing.

> THE NICHE TEST
>
> You've picked a real niche when you can name the industry's biggest Facebook group, describe a typical owner's Tuesday and list the three tools they complain about — without doing any research. If you can't, either research deeper or pick a vertical you already know from client work.

Start with the clients you already serve

The fastest path to a niche runs through your existing book of business. Pull up your client list and look for the vertical where you've had the most wins. Those clients have already taught you the industry's vocabulary, its objections and — most valuably — which parts of your HighLevel setup they'd riot over losing. That setup is your future product; you've been building it on retainer.

If your client base is scattered, look at your own background. Agencies founded by ex-realtors dominate real estate SaaS. A founder who spent years in fitness will spot problems in gym operations that an outsider never would. Industry insight is the moat; the software is just the drawbridge.

Listen where your market already talks

The best niche ideas come from real operators describing real frustrations. Join the online spaces where your potential customers gather — industry Facebook groups, subreddits, trade association forums — and read for patterns, not one-offs. When the fifth med spa owner this month complains about no-shows torching her injector's schedule, you're not looking at a complaint. You're looking at a product.

Study the tools they currently use, too. Read reviews of the incumbent vertical software in your niche. The one-star reviews tell you what to build; the five-star reviews tell you the price the market already accepts. Look for:

- Features users constantly complain about or request
- Interfaces so bloated that owners pay staff to work around them
- Pricing that punishes small operators (per-seat fees, forced annual contracts)
- Missing integrations HighLevel gives you out of the box — texting, review requests, missed-call textback

Validate with data, not gut feel

Enthusiasm is not evidence. Before committing, spend an evening with Google Trends, a keyword tool like Semrush or Ahrefs, and your niche's job boards. You're checking search volume for the problems you'd solve ("med spa booking software"), whether the vertical is growing or shrinking, and how many businesses actually exist in it. A quick proxy: if the niche supports dedicated conferences, trade magazines and at least one incumbent software vendor, it's big enough to feed a SaaS.

Run the revenue math

You don't need millions of users. You need a small market that pays well and stays. Work the numbers before you fall in love:

> EXAMPLE
>
> There are roughly 10,000 med spas in the US. Capture just 2% at $297/month and you're at **200 accounts × $297 = $59,400/month** — before setup fees or rebilling margin. A "tiny" niche funds a very real business.

Ask four questions of any niche: How many potential customers exist? What percentage could you realistically reach through the channels you know? What would the system be worth to them monthly? And how long will they stay? A tool that runs a business's lead flow keeps customers for years — which is exactly why vertical SaaS beats selling one-off funnels.

Size up the competition — then relax

Finding competitors in your niche is good news: it means money changes hands there. Your job isn't to be unique; it's to serve one segment better than anyone else. Study the incumbents for gaps — clunky mobile experiences, no two-way texting, weak automation, enterprise pricing — and position your offer directly against the sharpest gap. Most vertical software was built a decade ago. You're bringing a modern, automated, all-in-one system to markets still juggling five disconnected tools.

DO THIS NOW

- [ ] List your last 20 clients by industry and circle the vertical with the most wins
- [ ] Join the three biggest online communities for that vertical
- [ ] Read 30 one-star reviews of the incumbent software and note repeated complaints
- [ ] Run the revenue math: market size × 2% × your target monthly price

Finding problems worth solving

A niche tells you who to serve. Now find the specific, expensive problem your product will make disappear.

Ideas spark in ordinary places. A gym owner at a networking event mentions members ghosting after the first month. A dentist's office manager tells you she spends Friday afternoons calling no-shows. A roofer says half his leads go cold because he's on a roof when they call. None of these people want "software." They want the bleeding to stop. Your product is the tourniquet — but only if you've found a wound that actually hurts.

Not all problems pay

Businesses pay to solve problems that are frequent, expensive and emotionally charged. A med spa losing $8,000 a month to no-shows will sign today. An owner mildly annoyed by a clunky spreadsheet will "think about it" forever. Before building around any problem, score it honestly: How often does it happen? What does each occurrence cost in dollars or hours? And does the owner get visibly frustrated describing it? Two out of three is a maybe. Three out of three is a product.

Talk to real operators

Nothing beats direct conversations, and as an agency owner you have a head start: your clients and past prospects in the vertical will take your call. Book 5–10 short conversations and ask open-ended questions:

- What tasks eat most of your week?
- Where do leads leak out of your pipeline?
- What tools have you tried, and why did you stop using them?
- If you could fire one recurring headache, which one?

Listen more than you talk, and record the calls with permission — the exact phrases operators use become your landing page copy later. Watch for emotion. When someone's voice tightens describing a problem, you've struck something they'll pay to fix.

Mine the places they vent

Online communities are unfiltered focus groups running 24/7. Industry Facebook groups, vertical subreddits, trade forums and even the comment sections of industry podcasts reveal the complaints people won't say to your face. Don't just scroll — keep a running document of recurring frustrations, who voiced them and what they've already tried. Ten different people describing the same workflow pain, in the same words, is stronger validation than any survey.

Add competitor evidence to the same document. G2, Capterra and app-store reviews of your niche's incumbent tools are a sorted list of unmet needs. Note every complaint HighLevel already solves — two-way texting, unified inbox, automated review requests, missed-call textback. That overlap is your feature list, pre-validated.

> EXAMPLE
>
> An agency serving home-service clients noticed the same review complaint across three incumbent field-management tools: "no way to text customers automatically." They packaged a HighLevel snapshot around missed-call textback and appointment reminders, named it after the trade — and closed 11 accounts in the first month by quoting the reviews back to prospects.

Weigh the market before you commit

A painful problem in a dying market is still a bad business. Check the trajectory: Is the vertical growing? Are new businesses opening in it? Could you expand to an adjacent niche later — med spas to dental, gyms to martial-arts studios — using 80% of the same snapshot? The rise of any trend creates fresh gaps; remote work did it for collaboration tools, and the boom in aesthetics, home services and boutique fitness is doing it right now for vertical CRMs.

Pitfalls that kill SaaS offers early

- **Solving a problem nobody has.** If you can't find people complaining about it unprompted, it isn't a problem — it's your assumption.
- **Going broad to "keep options open."** A system for everyone is a system for no one, and it forces you to compete on price against HighLevel's own $97 plan.
- **Ignoring what the research says.** If operators keep telling you the real pain is X and you keep building Y because Y is more fun, the market will invoice you for the lesson.

> DO THIS NOW
>
> - [ ] Book five 20-minute calls with operators in your chosen vertical this week
> - [ ] Start a "pain log" document and add every recurring complaint you find
> - [ ] Score your top three problems on frequency, cost and emotion
> - [ ] Map which complaints HighLevel features already solve out of the box

Validate before you build

Snapshots are cheap to build and expensive to build wrong. Prove people will pay before you configure a single workflow.

The graveyard of agency SaaS projects is full of beautiful snapshots nobody bought. The fix is simple discipline: sell the thing before you build the thing. Every test in this chapter can run in days, costs less than a client dinner and uses tools you already own.

Start with a simple landing page

Build a one-page funnel in HighLevel — you can have it live in an afternoon. It needs three things:

- **The outcome, stated plainly, at the top.** Not "All-in-one CRM platform" — "Never lose another roofing lead to a missed call."
- **Three or four benefits tied to the pains from your research.** Automated review requests. Instant lead follow-up. One inbox for calls, texts and DMs.
- **One clear call to action.** "Get early access" or "Book a 15-minute demo" with a form or calendar underneath. One CTA, not five.

Keep the design clean and the promise specific. You're not launching — you're measuring whether the promise makes strangers raise their hands.

Drive a small amount of targeted traffic

A landing page with no visitors proves nothing. Run a small campaign — $10–20 a day on Facebook or LinkedIn — aimed tightly at your vertical: job titles, industry groups, followers of the trade associations. You're buying data, not customers. A hundred targeted clicks will tell you more about your offer than a month of guessing. Test two or three audience angles and note which headline earns the cheapest sign-ups.

Survey and interview the hand-raisers

Everyone who signs up gets two things: a short survey (5–7 questions on current tools, biggest frustrations, must-have features and budget) and an invitation to a 15-minute call. On the calls, show rough mockups or a demo of a HighLevel build, ask what they'd expect to pay, and note every feature request. The people who book calls are your future first customers — treat the conversations as pre-sales, not research theater.

Run it done-for-you first

Here's where agencies crush traditional founders: your "manual MVP" is just... agency work. Before opening self-serve SaaS mode, onboard 5–10 businesses done-for-you. Set up their sub-account personally, run their campaigns, send their review requests. Charge real money — even a discounted founding rate — because free pilots produce polite feedback, and paying customers produce the truth.

WHY THIS WORKS

Every done-for-you client teaches you what the productized version must automate. The workflows you find yourself rebuilding for the third client become your snapshot. The questions every client asks become your onboarding videos. You're not delaying the SaaS — you're building it with revenue instead of savings.

Test pricing while you test the product

Don't guess your price — test it. Offer different founding customers different terms: monthly vs annual, $197 vs $297, setup fee vs no setup fee. Watch what people accept without flinching. If everyone says yes instantly, you're too cheap. If half push back but the other half sign, you're close. Chapter six goes deep on pricing; for now, just collect real reactions to real numbers.

Measure what matters

Track a handful of numbers through the whole test: landing page visitor-to-signup rate, cost per lead by audience, the percentage of interviewees who say they'd pay, and — the only metric that really counts — how many actually do. Everything else is commentary.

Read the warning signs honestly

- Targeted traffic arrives but almost nobody signs up — the promise isn't landing
- People love the idea but stall when money comes up — the pain isn't expensive enough
- Prospects keep saying "doesn't [incumbent] already do that?" — your differentiation is too thin
- Interviews wander to a different problem than the one you pitched — follow them; that's the real product

A failed test is a win. It just saved you three months of building the wrong thing — pivot the offer and run it again next week.

DO THIS NOW

- [ ] Build a one-page offer funnel in HighLevel with a single CTA
- [ ] Run $150 of targeted ads split across two audience angles
- [ ] Interview every hand-raiser and quote them a real price
- [ ] Sign 5 founding customers done-for-you before touching SaaS mode

A value proposition that sells itself

Your product is a white-labeled platform thousands of agencies can access. Your message is the thing nobody can copy.

Here's the uncomfortable truth about white-label SaaS: your competitor down the street can spin up the same features tomorrow. What they can't copy is a message so precisely aimed at your niche that prospects feel understood before the demo starts. Your value proposition is the real product. The software is the delivery mechanism.

Three questions every value proposition must answer

In one breath, a prospect should learn: what specific problem you solve, how you solve it differently and why you over the alternatives. If any of the three is missing, the prospect fills the gap with "probably just another CRM" — and you've lost before the call.

Map pains to features with a canvas

Take the pain log from chapter two and build a simple two-column canvas. On the left, the customer profile: the jobs they need done, the pains blocking them, the gains they want. On the right, your value map: which feature kills which pain, and which outcome delivers which gain.

EXAMPLE — MED SPA PLATFORM

Customer profile

Jobs: fill the book, rebook clients, collect reviews

Pains: no-shows, leads ghosting after hours, staff buried in DMs

Gains: predictable schedule, five-star reputation, evenings back

Value map

Features: deposit-backed booking, instant SMS follow-up, unified inbox

Pain relievers: cuts no-shows, answers every lead in 30 seconds

Gain creators: 8+ hours back weekly, automated review engine

Write the core message

With the canvas done, the message writes itself. Make it:

- **Clear and direct.** No jargon. If a busy owner can't repeat it after one read, simplify it.
- **Benefit-first.** Not "AI-powered omnichannel automation" — "Never lose a lead to a missed call again."
- **Unmistakably niche.** Name the industry in the headline. "Built for med spas" filters out everyone else — that's the point.

Look at how the giants do it: Slack promised more productivity with less effort; Mailchimp told small businesses "Get your business online." Outcomes, not feature lists. Your version might be: "The booking and follow-up system built for med spas — cut no-shows and fill your calendar on autopilot."

Make it tangible with numbers

Abstract benefits slide off. Specific ones stick. "Saves time" becomes "saves 8 hours a week." "Reduces no-shows" becomes "cuts no-shows by up to 60% with deposit-backed booking and automated reminders." Show the ROI math on your pricing page: if the system recovers two lost patients a month at $400 each, a $297 subscription pays for itself twice over. When your founding customers produce real numbers, replace the estimates with their results and names — one specific testimonial from inside the niche outsells any feature grid.

Test the message like you tested the product

Run two landing page variants with different headlines and track sign-ups. Read both versions to prospects on calls and watch which one makes them lean in. Recycle the winning phrases into your ads, demos and onboarding. And revisit the message quarterly — when conversion dips, competitors reposition or the niche's problems shift, the value proposition moves first and the product follows.

Mistakes that flatten your message

- **Being generic.** "We help businesses grow" describes 10,000 companies, including HighLevel itself.
- **Listing features.** Owners don't buy workflows; they buy filled calendars and quiet evenings.
- **Echoing competitors.** If your headline could sit on the incumbent's site unchanged, it isn't a position — it's an echo.
- **Talking like software.** Write like you'd explain it to a client over coffee. Jargon reads as risk.

DO THIS NOW

- [ ] Fill in the two-column canvas using your pain log
- [ ] Write three headline variants that name the niche and the outcome
- [ ] Attach one number to every benefit on your landing page
- [ ] A/B test the top two headlines with your ad traffic

Build it on HighLevel

Snapshots, SaaS mode, white-label and smart outsourcing — how to ship a real product in weeks without writing code.

Validation done, message sharp — now you build. The good news: "building" a HighLevel SaaS is configuration, not construction. The work is deciding exactly what your niche gets, packaging it so onboarding runs itself and knowing which pieces to hand to specialists.

Scope the MVP ruthlessly

Your first version should solve the core problem and nothing else. For a med spa platform, that might be four things: deposit-backed booking, instant lead follow-up, appointment reminders and review requests. Every feature you add before launch is a feature you'll onboard, support and explain forever. HighLevel offers dozens of modules — hide the ones your niche doesn't need. A focused product feels custom-built; a kitchen sink feels like homework.

Build the master snapshot

The snapshot is your product's DNA — the sub-account template that deploys to every new customer. Build one flagship sub-account containing:

- **Pipelines** named in the niche's own language (Consult booked → Treatment done → Rebook due, not Stage 1–2–3)
- **Workflows** for the money moments: speed-to-lead SMS, missed-call textback, no-show recovery, review requests, rebooking nudges
- **Calendars and forms** pre-configured for the niche's actual services
- **Funnel and email templates** written in the vocabulary from your pain log
- **Dashboards** that surface the two or three numbers an owner actually checks

Your done-for-you founding customers from chapter three are the proving ground. Every fix you make in their accounts flows back into the master snapshot. By customer ten, deployment should take minutes, not days.

Flip on SaaS mode

SaaS mode turns your agency account into a software company. Configure your plans (chapter six covers what to charge), attach the snapshot so new signups get provisioned automatically, connect Stripe and enable rebilling on SMS, email, phone and AI usage. From the customer's side, they visit your site, pick a plan, enter a card and land inside a working system minutes later — no proposal, no kickoff call, no you.

DON'T SKIP

White-label everything before launch: your domain, your logo, your colors, custom menu names and a branded login page. The moment a customer sees "HighLevel" anywhere, your product becomes "that thing anyone can buy for $97." The white-label isn't vanity — it's your pricing power.

Automate onboarding like it’s a feature

Self-serve signup with confusing setup is churn with extra steps. Record short Loom-style walkthroughs for each core task, build an onboarding workflow that drips them over the first week, and use checklists inside the app so a new customer always knows the next step. Add AI where it removes support load — a chat widget answering common questions, AI-drafted review replies, conversation AI booking appointments. Every support ticket you automate away is margin.

Outsource the right things

You don't need employees; you need specialists for defined jobs. Good candidates for freelancers on Upwork or Toptal:

- Brand and interface polish — logo, funnel design, custom CSS for the white-label portal
- Complex integrations or custom widgets your niche demands
- Content — onboarding videos, help docs, niche blog posts for SEO
- Front-line support once you pass ~30 accounts

Keep strategy, snapshot design and customer conversations in-house — that's where your niche insight lives. Write clear briefs, start every new contractor on a small test project and track work in a simple board. Rule of thumb: outsource tasks, never ownership.

Common build traps

- **Feature sprawl.** Adding modules "because they're included" buries the outcome you sold. Ship the four features that kill the pain; expand from customer requests, not from the feature list.
- **Perfectionism.** Your snapshot at launch will be version one of twenty. Ship it, watch real usage and iterate in small weekly updates.

- **Platform edge cases.** Some niche demands won't fit HighLevel neatly. Solve them with integrations or a custom widget — or push back on the requirement. One awkward feature isn't worth breaking your standard deployment.

Plan for scale from day one

Growth on this model is mostly operational: keep the master snapshot versioned and documented, standardize how you push updates to existing accounts, watch usage rebilling margins as volume grows and add support help before you're drowning, not after. The product scales itself; your systems around it have to keep up.

DO THIS NOW

- [ ] Write your MVP scope: the 4-5 features that kill the core pain — nothing else
- [ ] Build the master snapshot inside your best founding customer's setup
- [ ] Complete the white-label: domain, branding, menus, login page
- [ ] Record onboarding walkthroughs for each core feature before launch

CHAPTER 06

Pricing your SaaS

Price on the value of a filled calendar, not the cost of a sub-account. Get this right and everything else gets easier.

Pricing is the highest-leverage decision in your SaaS. Too low and you attract tire-kickers who churn, while starving yourself of the margin to grow. Right, and every account funds acquisition of the next. Your platform cost is fixed — everything above it is a pricing decision, not a cost calculation.

The models that work for agency SaaS

Tiered subscriptions are the backbone. Three tiers is the sweet spot — a starter plan that gets an owner hooked, a professional plan where you want most customers to land and a premium plan that makes the middle look reasonable. Anchor each tier to outcomes, not module counts: "everything to capture leads" → "everything to capture and convert" → "your entire front office on autopilot."

Usage rebilling is the model most agencies underuse. HighLevel lets you resell SMS, email, phone minutes and AI at a markup you set. With healthy volume, rebilling alone can cover your platform subscription — every account's usage generates margin that scales with their success, which is exactly the kind of revenue you want.

Free trials beat freemium. Classic freemium (a forever-free tier converting 2–5% to paid) rarely fits here — every free account still occupies a sub-account and your support time. A 14-day trial with a card on file gives prospects the same risk-free taste while filtering out everyone who was never going to pay.

Setup fees are your hybrid weapon. A one-time onboarding fee ($297–997) monetizes the hand-holding, filters for serious buyers and funds your acquisition cost. Waive it strategically in launch promotions — a waived fee is a discount that doesn't lower your recurring price.

Set the initial number

Three inputs, in order of importance:

- **Value delivered.** If the system recovers two lost customers a month for a business whose average ticket is $400, it produces $800+ of monthly value. Price at a fraction of that — customers should feel like they're stealing from you slightly.
- **What the niche already pays.** Incumbent vertical software sets the reference price. Land within striking distance of it — meaningfully cheaper with more capability, or comparable with obviously more value.
- **Your unit economics.** Know your per-account cost: platform share, usage, payment processing, support time. Healthy SaaS runs 70–80% gross margins. If a price can't clear that, it's a hobby.

EXAMPLE — THREE-TIER STRUCTURE

Starter — $197/mo	Pro — $297/mo MOST POPULAR	Scale — $497/mo
CRM, booking calendar, missed-call textback, one user	Everything in Starter + automations, review engine, unified inbox, three users	Everything in Pro + AI booking bot, multi-location, priority support, unlimited users

Test, then keep testing

Your first price is a hypothesis. Run different offers past different founding customers, A/B test pricing pages, offer annual billing at roughly two months free and watch the numbers that matter: trial-to-paid conversion, churn by tier, revenue per account. If nobody blinks at your price, raise it for the next cohort — existing customers keep their rate, which quietly turns loyalty into a perk.

Build the upsell ladder

Mature SaaS businesses make a third or more of revenue above the base plan. Natural rungs on your ladder: tier upgrades as the customer's business grows, add-on services (done-for-you campaign management — your agency skills as a premium), extra locations or users, AI features as a paid add-on and annual prepay. Design the ladder now so every account has somewhere to climb.

Pricing mistakes to avoid

- **Starting too low.** $47/month attracts customers who treat the product as disposable — and raising prices later is far harder than discounting down. When unsure, price higher and run launch promotions.
- **Complexity.** If a prospect can't pick a plan in 30 seconds, they pick nothing. Three tiers, plain names, obvious differences.
- **Competing with HighLevel's own pricing.** If your offer is generic, prospects will find the $97 direct plan. Your niche packaging, snapshot and support are why your number is bigger — make sure the offer shows it.
- **Set-and-forget.** Revisit pricing every quarter. Your product improves monthly; your price should follow it.

DO THIS NOW

- [ ] Calculate your per-account cost including usage and support time
- [ ] Draft three tiers anchored to outcomes, with your target price in the middle
- [ ] Set rebilling markups on SMS, email, phone and AI usage
- [ ] Write your upsell ladder: what does each account buy next?

Recap and your 30-day plan

Everything in one place — and exactly what to do with the next 30 days, wherever you're starting from.

You now have the full blueprint: a process for turning platform access and industry insight into a software business. Before the action plan, the whole book in six moves.

The blueprint in six moves

- **Go narrow.** Pick one vertical — ideally one your agency already serves — and own it. Generic tools compete with giants; niche products compete with nobody.
- **Find expensive pain.** Interview operators, mine communities and competitor reviews, and score problems on frequency, cost and emotion. Build only where all three run hot.
- **Sell before you build.** Landing page, small ad spend, real conversations, real prices — and 5–10 done-for-you founding customers before SaaS mode ever turns on.
- **Lead with the message.** A niche-naming, outcome-first value proposition is the asset competitors can't clone. Numbers make it land; testimonials make it stick.
- **Configure, don't code.** One ruthless MVP scope, one master snapshot, full white-label, automated onboarding — and outsource tasks, never ownership.
- **Price on value.** Three outcome-anchored tiers, trial over freemium, rebilling margins on, an upsell ladder — and a quarterly review so price keeps pace with the product.

Marketing that actually works at this stage

You don't need a big budget — you need presence where your niche already gathers. Answer questions helpfully in their communities. Publish content that solves their problems by name ("How med spas cut no-shows in half"). Turn founding customers into case studies and referral engines; in tight verticals, owners talk to each other constantly, and word of mouth compounds faster than any campaign. Track which channel produced each signup and double down on the winner.

Measure what matters

Five numbers tell you the health of the business: new accounts per month, trial-to-paid conversion, monthly churn, revenue per account and support hours per account. Review them monthly. Rising churn means an onboarding or product problem; flat revenue per account means your upsell ladder isn't working; ballooning support hours means something needs a video or an automation.

Your 30-day plan

`WEEK 1` **Choose and research.** Pick your vertical from your client history, join its three biggest communities, read 30 incumbent reviews and start the pain log. Book five operator calls.

`WEEK 2` **Validate.** Run the calls, build the one-page offer funnel, launch $150 of targeted ads and draft the value proposition canvas from what you hear.

`WEEK 3` **Sell.** Pitch every hand-raiser a founding-customer deal at a real price. Close 3-5 done-for-you accounts and start building their setups — this is your master snapshot taking shape.

`WEEK 4` **Systemize.** Consolidate what you built into the snapshot, draft your three tiers, complete the white-label and map the path to flipping on SaaS mode next month.

Thirty days from now you can have a validated niche, paying founding customers and a product taking shape — or you can have the same agency you have today. The difference isn't information anymore. It's motion.

Building a SaaS on HighLevel isn't a moonshot; it's a sequence. Solve a real problem for a specific market, listen relentlessly and improve every week. Start small, stay narrow and let recurring revenue do what retainers never could.

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Charles Higgins

Founder of Pinnacle Ai and Nexus Hub. Charles has spent years in the HighLevel trenches — building, scaling and productizing — and created Nexus Hub so agency owners could skip the expensive lessons.