MEMBER RESOURCES · GUIDE 01

The 30-Day Pipeline Builder

Build a predictable sales engine for your HighLevel agency — pipelines, workflows and snapshots included.

Charles Higgins

NEXUS HUB — WHERE HIGHLEVEL AGENCIES GET UNSTUCK.

BEFORE YOU START

From feast-or-famine to predictable revenue

Imagine opening your agency dashboard each morning knowing exactly where your next client is coming from. Not hoping. Knowing — how many prospects are moving through your pipeline, which stage they're in and when they'll become paying retainers.

The feast-or-famine cycle kills more agencies than churn does. One month you're turning away work; the next you're wondering how to cover software costs and payroll. That unpredictability makes strategic planning impossible, forces reactive decisions and quietly erodes your confidence as an operator.

The difference between agencies that struggle and agencies that scale isn't talent or luck. It's a repeatable process that converts prospects into clients consistently — and you already own the perfect tool to run it. HighLevel's Opportunities, Workflows and Snapshots were built for exactly this. Most agencies just never set them up as a system.

Over the next 30 days, this guide walks you through building that system: first for your own agency, then packaged as a snapshot you can deliver to every client you serve.

WHO THIS IS FOR

HighLevel agency owners and operators who sell retainers, snapshots or SaaS-mode subscriptions — and want new business to arrive on a schedule, not by accident.

HOW TO USE IT

One action per day, 30–60 minutes each. Print the worksheets and fill them in as you go. By day 30 your pipeline lives in HighLevel, not in your head.

CH

Charles Higgins founded Nexus Hub to give HighLevel agencies what he wished he'd had: straight answers, working snapshots and a network of operators who've already solved your problem.

CONTENTS

Your 30-day roadmap

> **Worksheets included.** Pages marked `WORKSHEET` are built to be printed and filled in. Do the work — reading alone builds nothing.

PHASE 1 · DAYS 1–7

Foundation work

01

What a pipeline actually is

A sales pipeline is a visual map of every prospect's journey from first contact to signed retainer. In HighLevel, that map lives in **Opportunities** — each deal is a card, each stage is a column, and the board tells you at a glance:

- How many prospects sit at each stage of the buying journey
- What percentage typically moves from one stage to the next
- Where prospects commonly get stuck
- How long each stage usually takes
- What revenue to expect, based on total pipeline value

DAY 1

Audit how you sell today

Document exactly how a lead becomes a client at your agency right now. Be brutally honest — the gaps are the point.

- List every step a prospect takes from first contact to signed agreement
- Note where you commonly lose prospects — and check your HighLevel conversations for leads that simply went quiet
- Identify which parts of your process are consistent and which are improvised
- Calculate your average time from first contact to closed deal
- Document how you track prospects today — Opportunities, a spreadsheet or memory

COMMON AUDIT FINDINGS

Inconsistent follow-up timelines · no clear qualification criteria · different approaches for similar prospects · Opportunities installed but never updated · lost deals from forgotten follow-ups.

WORKSHEET DAY 1

Agency sales reality check

Rate each part of your current sales process from 1 (completely chaotic) to 5 (completely systematic). Circle one number per row.

Lead generation Consistent daily volume from known sources	1	2	3	4	5
Speed to lead First response within five minutes	1	2	3	4	5
Qualification process Same questions, every prospect	1	2	3	4	5
Proposal development Templated, fast, ROI-backed	1	2	3	4	5
Follow-up system Automated — nothing depends on memory	1	2	3	4	5
Closing process Contract and payment in one step	1	2	3	4	5
Pipeline tracking Opportunities board updated daily	1	2	3	4	5

Scoring. Any row below 4 is a place your pipeline will create immediate improvement. Your lowest score is your first optimization target on day 29.

DAYS 2–3

Define your pipeline stages

Every effective pipeline has five to seven clearly defined stages. On **day 2**, map the logical progression a prospect should take from discovering your agency to paying you. Here's the pipeline most HighLevel agencies should start with:

STAGE	WHAT IT MEANS	EXIT CRITERIA
Lead	Prospect opted in or replied to outreach	Discovery call booked on your calendar
Discovery	Qualification call to assess fit	Budget, timeline and decision-maker confirmed
Audit delivered	You present findings on their current lead flow	Prospect requests a proposal
Proposal sent	Scoped offer with pricing delivered	Proposal reviewed together, interest confirmed
Negotiation	Terms, scope and start date finalized	Verbal yes on scope and price
Closed won	Client signed and paid	Agreement signed, first payment received

Selling SaaS mode or snapshots too? Run a second pipeline per offer rather than cramming every deal type into one board — HighLevel lets you create multiple pipelines per sub-account.

DAY 3

Write your stage progression rules

For each stage, the exit criteria must be objective and verifiable before a card moves right. "They seemed interested" is wishful thinking; "discovery call booked on my calendar" is a fact. These rules are what make your conversion rates — and your forecast — trustworthy.

Set your pipeline metrics

Your pipeline needs numbers to be useful. Track five: **pipeline value**, **stage conversion rates**, **average deal size**, **sales cycle length** and **deals per stage**. For retainer deals, count first-year value (monthly retainer × 12), not one month.

WORKSHEET

Days 4–5 · Baseline conversion rates

Using your last 10–20 deals (or your best estimate):

Leads that entered the pipeline

Qualified (count, %)

Received proposals (count, %)

Closed won (count, %)

These are your baseline conversion rates. You'll improve them — but start with honest numbers.

Days 6–7 · Weighted pipeline value

Assign each stage a win probability, then multiply. A $12,000 deal sitting at Proposal (50%) contributes $6,000 to your weighted pipeline. HighLevel does this math for you once you set a win probability per stage.

STAGE	DEALS	TOTAL VALUE	PROBABILITY	WEIGHTED
Lead	20	$240,000	10%	$24,000
Discovery	10	$120,000	25%	$30,000
Audit delivered	6	$72,000	40%	$28,800
Proposal sent	4	$48,000	50%	$24,000
Negotiation	2	$24,000	75%	$18,000
TOTAL	42	$504,000	–	$124,800

PHASE 2 · DAYS 8–21

Build it in HighLevel

02

Skip the CRM shopping trip — you already own one of the best pipeline tools in the business. Everything in this phase happens inside your agency's own sub-account.

DAYS 8–10 Set up your pipeline in Opportunities

1. Go to **Opportunities → Pipelines** and create a pipeline named "Agency sales" with the stages you defined on day 2
2. Set a win probability on each stage (visible in pipeline settings) so weighted value is calculated automatically
3. Add custom fields on the contact for the essentials: budget range, decision timeline, decision-maker, lead source
4. Import your existing prospects and create an opportunity card for each active conversation
5. Place every card in the stage its evidence supports — not the stage you hope it's in

SETUP CHECKLIST

- [ ] Pipeline stages match the customer journey you defined on day 2
- [ ] Win probability set on every stage
- [ ] Custom fields capture budget, timeline, decision-maker and lead source
- [ ] Every active conversation has an opportunity card in the right stage
- [ ] Dashboard shows pipeline value and deal count by stage

Nexus tip. Set up the pipeline in a dedicated "template" sub-account instead of directly in your agency account. On day 30 you'll save it as a snapshot — and deploy it to clients in minutes.

DAYS 11–14

Define stage-specific activities

Each stage needs a playbook: what you collect, what you send, what conversation happens and which objections to expect. Document it once, then let Workflows run the repetitive parts.

Lead stage

- Workflow: instant speed-to-lead — SMS + email within five minutes of form submission, with your booking link
- Send one relevant case study; connect on LinkedIn; research the business before the call
- Add to your nurture list (they should hear from you weekly even if they never book)

Qualification stage

- Run the discovery call from a script: current lead flow, what they've tried, budget range, decision timeline, who signs
- Record answers into your custom fields during the call, not after
- Disqualify fast — a polite no now beats three months of maybes

Proposal stage

- Build the proposal from a template in HighLevel's Documents & Contracts — customized scope, standard structure
- Include an ROI section: what their numbers look like at your average client results
- Present it live, never just email it; workflow reminder fires a follow-up call 24 hours after delivery

Negotiation and closing

- Keep a one-page FAQ for the questions that stall deals: contract length, guarantees, who does the work
- Send agreement and invoice through HighLevel — signature and payment in one step
- Won deal triggers your onboarding workflow automatically; lost deal gets a reason logged, every time

DAYS 15–18

Templates and automated follow-up

DAYS 15–16 Build your template library

Create email and SMS templates in HighLevel for every recurring touch: initial outreach, follow-up sequence, meeting confirmations, proposal delivery and objection responses. Use custom values for the parts that personalize — and mark anything that needs manual editing so nothing ships with placeholder text.

DAYS 17–18 Build the follow-up workflow

This is where HighLevel earns its keep: no prospect ever falls through the cracks again. Build one workflow per pipeline stage, triggered by the opportunity entering that stage.

DAY	CHANNEL	CONTENT FOCUS
Day 0	SMS + email	Instant response — introduction, value proposition and booking link
Day 3	Email	Case study relevant to their industry
Day 7	SMS	Short check-in — answer the objection you hear most
Day 14	Email	New angle: a quick win they can use whether or not they hire you
Day 21	Call task	Personal call — final direct attempt
Day 30	Workflow	Move to monthly nurture; keep the door open

Cap active follow-up at five to seven attempts, then move the contact to a long-term nurture campaign — monthly value emails that keep the door open.

DAYS 19–21

Build the data-entry habit

The most sophisticated pipeline fails if you don't update it. Automation covers the logging of emails, SMS and calls — but stage moves and notes are on you. Three habits keep the board honest:

15 min

Bookend the day

Review the board first thing and last thing. Nothing leaves the office unlogged.

5 min

After every interaction

Update the card immediately — the mobile app makes this a parking-lot task after meetings.

Weekly

Full board sweep

Every card gets a scheduled next action. No orphans, no "I'll remember."

WORKSHEET **After-interaction checklist**

Print this and keep it by your desk until it's muscle memory.

- [ ] Log the date and type of interaction on the opportunity
- [ ] Move the card if — and only if — exit criteria are met
- [ ] Record key information learned in the contact’s custom fields
- [ ] Note any objection raised, verbatim
- [ ] Schedule the next action with a reminder or workflow
- [ ] Adjust the deal value or probability if anything changed

PHASE 3 · DAYS 22–30

Optimize and analyze

03

DAY 22 The weekly pipeline review

Thirty minutes, same time every week, non-negotiable. This is what turns your pipeline from a tracking system into a management tool. Fill this in every week:

WEEKLY REVIEW · DATE: ______________ WORKSHEET

Current pipeline value $	Goal $
Deals expected to close this week	New opportunities this week
Stalled deals (14+ days, no movement)	Lead → qualified rate %
Qualified → proposal rate %	Proposal → closed rate %

Priority actions this week:

____

____

____

DAYS 23–24 Find your bottlenecks

Calculate average time in each stage and flag stages with below-average conversion. Note the objection you hear most at each sticking point — that objection is your improvement project for days 29–30.

DAYS 25–26

Forecast your revenue

Once your conversion rates are real numbers, you can work backward from any revenue goal to the exact number of leads you need. This is the math that ends feast-or-famine:

EXAMPLE · WORKING BACKWARD FROM $12,000 IN NEW MRR

$12,000	new MRR needed ÷ $1,200 average retainer = **10 closed deals**
10	closed deals ÷ 30% proposal close rate = **34 proposals**
34	proposals ÷ 40% qualified-to-proposal rate = **85 qualified leads**
85	qualified leads ÷ 50% qualification rate = **170 leads per month**

Now lead generation has a target instead of a vibe: 170 leads a month, roughly eight per working day. Miss the leading indicator and you know about the revenue gap 60 days before it happens.

WORKSHEET **Your numbers**

Monthly revenue goal $	Average deal size $
Closed deals needed	Proposals needed
Qualified leads needed	Leads needed per month

DAYS 27–30

Dashboard and optimization plan

Days 27–28. Configure your HighLevel dashboard for at-a-glance pipeline health. Five signals matter:

SIGNAL	HEALTHY LOOKS LIKE
Pipeline value vs target	3–4× your monthly revenue goal in total pipeline
Deals by stage	Funnel-shaped — more cards on the left than the right
Average deal age by stage	No stage averaging longer than your defined maximum
Stage conversion rates	At or above your baselines, trending up
Win/loss reasons	Logged on every closed card — patterns reviewed monthly

Days 29–30. Pick your weakest conversion stage and write a 60-day optimization plan for it:

60-DAY OPTIMIZATION PLAN

WORKSHEET

Focus stage ____________________

Current conversion rate ____________________ %

Target in 60 days ____________________ %

Review dates ____________________

Interventions (three to five, each with an owner and a week):

____

____

____

____

Example: proposal-to-close at 30% → add a 24-hour follow-up call workflow, an ROI section in every proposal and case-study social proof. Target 40% within 60 days; review weekly.

AFTER DAY 30

Sustaining the system

The pipeline is a living system. It stays accurate — and useful — on three cadences:

Daily

30 MIN TOTAL

- Morning: check new leads, prep today's scheduled activities, prioritize by deal size and probability
- After each interaction: update the card, move stages when criteria are met, schedule the next action
- End of day: confirm everything was logged; flag missed follow-ups for tomorrow

Weekly

30 MIN

- Run the weekly review (page 12) and clean the board
- Contact or disqualify anything with no activity in 14 days — a smart list makes these one click to find
- Confirm every open card has a scheduled next action

Monthly

60 MIN

- Compare forecast to actual results; adjust stage probabilities to match reality
- Analyze win/loss reasons for patterns; recalculate sales cycle length
- Pick one focus area for improvement in the coming month

The rule that matters most. Prospecting happens daily regardless of how full the pipeline looks. Agencies stop prospecting when they're busy — that's the exact mechanism of feast-or-famine.

Four common problems, solved

Too many stalled deals

SYMPTOMS

Cards sitting in one stage far past average. Pipeline value grows but revenue doesn't.

FIX

Set maximum stage durations (nothing lives in Proposal past 30 days). Build a workflow that recycles stalled deals into nurture. Qualify harder for decision timelines up front.

Feast-or-famine revenue

SYMPTOMS

Revenue spikes then craters. The pipeline empties every time you get busy with delivery.

FIX

Minimum daily prospecting regardless of workload. Automate lead generation so the top of funnel never depends on your calendar. Nurture prospects who aren't ready yet.

Low conversion at one stage

SYMPTOMS

Plenty of leads, few discovery calls — or plenty of proposals, few closes.

FIX

Tighten the entry criteria for that stage. Build stage-specific content that answers its most common objection. Practice the conversation; A/B test your approach.

Inaccurate forecasting

SYMPTOMS

Projections consistently miss high or low. Pipeline value doesn't correlate with actual revenue.

FIX

Reset stage probabilities from your real historical data monthly. Require harder evidence for late-stage cards. Verify decision authority before anything passes Discovery.

BONUS · FOR YOUR CLIENTS

Productize it: the pipeline snapshot

Here's the part most agencies miss: everything you just built is a product. Your clients have the same feast-or-famine problem you had — and you now own a working, tested fix inside the platform you already resell.

Save your pipeline, workflows, templates, custom fields and dashboard as a **snapshot**, and pipeline setup becomes a deliverable you deploy in minutes instead of a service you rebuild for every client.

1

Generalize

Swap agency-specific copy in templates for custom values. Rename stages to fit the client's industry — the structure stays.

2

Snapshot

Save the sub-account as a snapshot in your agency view. Version it — you'll refine it with every deployment.

3

Package

Sell it as a setup fee plus retainer, bundle it into onboarding or make it the spine of your SaaS-mode offer.

WHAT GOES IN THE SNAPSHOT

- [ ] The pipeline with stages and win probabilities
- [ ] Speed-to-lead and follow-up workflows
- [ ] Email and SMS template library
- [ ] Custom fields and smart lists
- [ ] Calendar and booking configuration
- [ ] The pipeline health dashboard

Onboard each client with the same 30-day cadence you just ran: weeks one and two to customize stages and templates, weeks three and four to train their team on the weekly review.

CONCLUSION

From sales chaos to a revenue engine

Your pipeline is more than a tracking system — it's the engine that makes agency growth predictable. You now have clear visibility from lead to close, objective criteria for every stage move, a forecast you can plan hiring around and automated follow-up that never forgets.

Keep the momentum with one focus per day this week: run your first formal weekly review, attack your biggest bottleneck, clean the board, raise lead volume from your best source, tighten qualification, sharpen your dashboard — then set your next 30-day improvement goal.

The agencies that scale aren't the lucky ones. They're the ones that treat sales as a system. Yours is built. Now run it.