

A 5-DAY IMPLEMENTATION ROADMAP

Launch client chatbots in five days

Plan, build and ship a Conversation AI chatbot inside HighLevel — for your agency and every client you serve. No developers, no new tools, one working week.

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INTRODUCTION

Your clients expect instant answers. Sell them the system that delivers

Customer expectations have shifted. People want answers on their schedule, not your client's. A well-built chatbot is a digital employee that never sleeps, never takes a sick day and handles a dozen conversations at once — answering common questions, capturing leads and booking appointments while the business owner runs the business.

Here's the part most agencies miss: you already own the platform. HighLevel's Conversation AI, chat widget and workflows give you everything you need to build, deploy and bill for chatbots — no third-party tools, no per-seat licenses eating your margin. Every chatbot you launch is a new recurring revenue line and a stickier client.

This roadmap breaks the build into five focused days. Day 1 is planning, days 2–3 are the build, day 4 is testing and day 5 is launch. Run it once on your own agency site to learn the process, then run it as a productized service for every client on your roster — the final chapter shows you how to price and package it.

By Friday you'll have a working chatbot that delivers real value, plus a repeatable delivery system you can sell. Let's get started.

HOW TO USE THIS GUIDE

Each day has three blocks — morning, afternoon and evening. Budget 2–4 hours per day.

Each day ends with deliverables — don't move on until they're done.

Pick one pilot — your own agency site or one friendly client. Nail it once, then repeat.

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DAY ONE

Strategic planning and conversation mapping

MORNING

Define the chatbot's one job

Most chatbot builds fail because they try to solve everything at once. Pick one primary objective for this bot — you can expand later:

- **Customer service** — answer the questions the business fields every day: hours, policies, pricing
- **Lead capture** — collect name, email and phone from website visitors straight into HighLevel contacts
- **Appointment booking** — drive visitors into a HighLevel calendar without human back-and-forth
- **Service guidance** — help visitors find the right service or package

EXERCISE • PURPOSE DEFINITION

Complete this statement: *"This chatbot's main purpose is to _____."* Be specific. Not "improve customer service" — "answer the 10 most common questions about pricing and availability, and book qualified callers into the sales calendar."

AFTERNOON

Audit the real questions

Mine the channels HighLevel already tracks. Open the client's Conversations tab and read the last month of SMS, email, GBP and social messages. Check call recordings and missed-call texts. Ask whoever answers the phone what they repeat 10 times a day. Log everything in a simple table:

Question	Frequency (1–5)	Complexity (1–3)
What are your hours?	5	1
Do you serve [area]?	4	1
How much does [service] cost?	5	2
Can I book online?	4	1

Focus on questions rated 4–5 for frequency and 1–2 for complexity. Those are your automation wins.

EVENING

Map the conversation flows

For each high-frequency, low-complexity question, sketch the flow: the trigger, the answer, the follow-up the visitor will need next. Example:

SAMPLE FLOW • "HOW MUCH DOES IT COST?"

Visitor: "How much is a deep clean?"

Bot: "Deep cleans start at \$180 and depend on square footage. Want a quote for your home? I just need your zip code and rough square footage."

Then: collect details, offer to book an estimate on the calendar, or hand off to a human during business hours.

Write at least five flows in the client's voice — conversational, helpful and on-brand. These become your Conversation AI training material on day 3.

DAY 1 DELIVERABLES

- One-sentence purpose statement for the bot
- List of 5–10 high-frequency, low-complexity questions
- Written conversation flows for at least five of them

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DAY TWO

HighLevel setup and widget install

No platform shopping required — everything lives in the sub-account you already manage. Today you'll turn on Conversation AI, brand the chat widget and get it live on the site.

MORNING

Enable Conversation AI

1. In the client's sub-account, go to **Settings → Conversation AI** and enable it. Check your agency plan — Conversation AI is a premium feature you can rebill with markup.
2. Choose the mode: **Suggestive** (drafts replies for humans to approve) or **Auto-pilot** (replies on its own). Start pilots in suggestive mode; switch to auto-pilot once day 4 testing passes.
3. Set the bot's name and personality prompt to match the client's brand voice — the tone you captured in yesterday's flows.
4. Pick the channels: web chat first; SMS, Facebook and Instagram DMs can follow after launch week.

AFTERNOON

Brand and install the chat widget

1. Go to **Sites → Chat Widget**. Set the widget type to live chat (two-way conversation, not just SMS capture).
2. Brand it: client logo as the avatar, brand colors, a welcome message written in their voice ("Hi! Ask me about pricing, availability or booking — I'll answer right away.").
3. Configure behavior: bottom-right placement, a 3–5 second greeting delay and an acknowledgment message that sets expectations after hours.
4. Install: on a HighLevel-hosted site or funnel the widget attaches automatically. On WordPress, Shopify or any external site, copy the widget code from **Sites → Chat Widget → Get Code** and paste it before the closing body tag — or use the HighLevel WordPress plugin.

TROUBLESHOOTING

Widget not showing? Clear the browser cache, check for ad blockers and confirm the code sits on every page you expect it on. Test in a private window before you blame HighLevel.

EVENING

Build the first flow

Take the simplest flow from day 1 — usually hours or service area — and implement it end to end. Write the trigger phrases and their variations ("hours", "open", "close", "when are you open"), the response and the follow-up quick replies ("Book now", "Get directions", "Ask something else"). One complete, working conversation before you close the laptop.

DAY 2 DELIVERABLES

- Conversation AI enabled in the sub-account, in suggestive mode
- Branded chat widget installed on the website
- One conversation flow fully working

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DAY THREE

Training the bot and wiring the workflows

MORNING

Feed the knowledge base

Conversation AI learns from what you give it. Load it in this order:

1. **Crawl the website** — point the bot at the client's site URL so it absorbs services, pricing pages and policies.
2. **Add FAQ pairs** — enter every day-1 question with the exact answer you wrote. These override the crawl when they conflict.
3. **Set intent flows** — business basics first (hours, location, contact), then services, pricing, policies, booking.

Keep every response to 1–3 sentences, in natural language, with a next step. A reliable template: *greeting + direct answer + context + next step*. "Hi! Deep cleans start at \$180 with most homes landing between \$180–320. Want an exact quote? Tap below to book a free estimate."

AFTERNOON

Wire lead capture into the CRM

This is where HighLevel beats every standalone chatbot: captured leads land directly in the client's CRM, pipeline and automations. Build a workflow that fires when the bot collects contact details:

1. Bot asks for name, then email or phone, then the specific need — one question per message, never a form dump. Conversational collection converts meaningfully better than forms.
2. Add one or two qualifying questions: budget range, timeline or property size.
3. Workflow trigger: contact created or tag applied by the bot → add to the "Chatbot leads" pipeline stage → notify the client by SMS and email → fire a speed-to-lead follow-up if no one responds within 15 minutes.
4. Close the loop: "Thanks! Someone from the team will reach out within the hour. Meanwhile, want to see our before-and-after gallery?"

EVENING

Fallbacks and human handoff

No bot answers everything. Build the graceful exits now:

- **General fallback** — "Sorry, I didn't catch that. Here are the things I can help with:" followed by quick-reply buttons.
- **Business hours handoff** — assign the conversation to a team member in HighLevel and tell the visitor a human is joining.
- **After-hours handoff** — "The team is offline right now. Leave your number and you'll hear from us first thing tomorrow."
- **Escalation triggers** — complaints, urgency words ("immediately", "emergency"), refund requests and high-value inquiries should always offer a human, instantly.

DAY 3 DELIVERABLES

- Knowledge base loaded: site crawl + FAQ pairs for every day-1 question
- Lead capture workflow wired to pipeline, notifications and follow-up
- Fallback responses and human escalation paths in place

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DAY FOUR

Testing and refinement

MORNING

Break your own bot

Test every path before a real visitor does. Keep the bot in suggestive mode, open a testing spreadsheet and run each flow four ways: exact trigger phrase, a variation, a misspelling and a completely different phrasing. Then hit the edge cases — one-word replies, two questions in one message, going off-topic mid-flow.

Test scenario	Expected	Actual	Status
"What time do you close?"	Business hours	Correct hours shown	Pass
"Can I return without receipt?"	Receipt-specific policy	Generic policy only	Fail
"Do u do same day??"	Same-day availability	Fallback triggered	Fail

AFTERNOON

Fresh-eyes testing

Internal testing only catches so much. Recruit three to five people who've never seen the bot — teammates, the client's front-desk staff, a friend. Give each of them specific tasks: "Find out if they offer same-day service", "Book a consultation for Tuesday afternoon", "Try to confuse it." Watch how they actually phrase things, then ask: did it understand you? Were you ever stuck? What felt robotic?

EVENING

Triage and fix

Sort every issue into three buckets and work top-down:

- **Critical — fix before launch:** broken flows, wrong information, missing answers to common questions, lead capture failures
- **Important — fix if time allows:** more trigger variations, clearer responses, better fallbacks
- **Future — write down for later:** new topics, SMS and DM channels, deeper personalization

DAY 4 DELIVERABLES

- Completed testing spreadsheet with every flow exercised
- Feedback from 3–5 outside testers
- All critical issues fixed; future list documented

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DAY FIVE

Launch and monitoring

MORNING

Pre-launch checklist

- Review every flow one final time; test on mobile — most chat traffic is mobile
- Verify lead capture writes to the pipeline and notifications reach the client
- Run the human handoff end to end; make sure the client's team knows how to pick up escalated chats
- Agree on a backup: how customers reach the business if the widget ever fails
- Decide soft launch vs announcement — a quiet first week surfaces issues before you promote it

AFTERNOON

Set the success metrics

Pull these from HighLevel's conversation reporting and your pipeline. They're also your monthly proof-of-value report to the client:

Metric	What it tells you	Target
Conversation completion rate	Conversations reaching a useful end	70–85%
Leads captured	Contacts created by the bot	Set from traffic
Appointments booked	Calendar bookings from chat	Trend up weekly
Human escalation rate	Chats needing a person	Under 30%
Top unanswered questions	Next training material	Review weekly

EVENING

Go live

1. Have one outside person run a final test
2. Switch Conversation AI from suggestive to auto-pilot
3. Confirm the widget renders correctly on the live site and send a test message
4. Tell the client's team the bot is live and who monitors what

5. Check conversations hourly on day one; adjust problem responses immediately and log unexpected questions for training

DAY 5 DELIVERABLES

- Pre-launch checklist complete; handoff tested
- Reporting metrics defined and dashboard bookmarked
- Live chatbot in auto-pilot, monitored hourly on launch day

Optimize weekly, expand monthly

Launch is the beginning, not the finish line. The best chatbots compound: every conversation teaches you what customers actually want. Thirty minutes a week keeps the bot sharp — and that maintenance is exactly what your monthly retainer pays for.

WEEKLY · 30 MINUTES

- Read conversation logs for unanswered or misunderstood questions
- Add new trigger phrases and FAQ pairs
- Check completion rate, leads captured and escalation rate for trends

MONTHLY · 2 HOURS

- Add topics for new services, offers and seasonal changes
- Refine qualification questions and lead scoring
- Expand channels: SMS, Facebook and Instagram DMs, missed-call text-back

Turn this roadmap into a productized service

You've now run the build once. The second time takes half as long, and by the third client you'll have a snapshot that does most of the setup for you. That's a service: fixed scope, five-day delivery, recurring revenue.

Pricing that works

Anchor on the value — a bot that captures even two extra jobs a month pays for itself.

Suggested structure:

Package	What's included	Suggested price
Setup	The 5-day build: discovery, Conversation AI config, widget, workflows, testing, launch	\$1,500–3,000 one-time
Care plan	Weekly optimization, monthly training updates, monthly performance report	\$297–497/month
Growth add-on	SMS + social DM channels, booking bot, missed-call text-back	\$150–300/month

Rebill Conversation AI usage through your agency plan with markup — HighLevel's rebilling makes the margin automatic.

Client onboarding in five steps

1. **Kickoff call** — run the day-1 purpose exercise together; the client fills the question audit
2. **Access and assets** — logo, brand colors, website access, FAQ documents, policies
3. **Build week** — days 2–4 are yours; send one mid-week progress note
4. **Launch review** — 20-minute walkthrough of the live bot and how handoff works for their team
5. **Day-30 report** — conversations handled, leads captured, appointments booked. This report renews the retainer

PRO TIP • SNAPSHOT IT

After your second build, save the sub-account as a HighLevel snapshot — widget settings, workflows, pipelines and bot prompts included. New client setup drops from days to hours, and your margin goes up every time.

CONCLUSION

Five days from now

In one working week you'll have a chatbot answering questions, capturing leads and booking appointments around the clock — built entirely inside the platform you already pay for. More importantly, you'll have a delivery system you can repeat for every client on your roster.

The bot doesn't need to be perfect on day one. Every conversation is training data; every unanswered question is next week's improvement. Ship it, watch it, sharpen it.

Your action plan

When	Do this
Day 1	Purpose statement, question audit and five conversation flows
Day 2	Conversation AI on, widget branded and installed, first flow live
Day 3	Knowledge base loaded, lead capture workflows wired, handoff built
Day 4	Test with fresh eyes, fix every critical issue
Day 5	Launch in auto-pilot and monitor hourly
Week 2	First optimization pass from real conversations
Month 1	Day-30 report, snapshot the build, pitch client #2

Your chatbot journey starts now. Block out day 1 on your calendar and map those first five conversations today.



YOU DON'T HAVE TO FIGURE THIS OUT ALONE

Join the community where HighLevel agencies get unstuck

This roadmap is one of dozens of playbooks, snapshots and templates inside Nexus Hub. Bring your stuck point to a weekly Q&A, leave with a plan.

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