

The Agency Launch Checklist

30 Steps. Zero to Profitable. Everything You Need — In Order.

The exact checklist I wish someone handed me when I was starting out. No fluff. No filler. Just what works.

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How to Use This Checklist

Work through these 30 steps in order. Each phase builds on the one before it. Don't skip ahead — foundation first, then infrastructure, then clients, then scale.

Check off each box as you complete it. By the end, you'll have a fully operational, automated agency running on ONE platform.

 **Total estimated time:** 2-3 weekends if you follow the steps in order. Most of the time is in setup and customization — the automation does the heavy lifting after that.



Phase 1: Foundation (Steps 1-8)

Get the basics right before you build anything. Your brand, your offer, your positioning.

- ☒ **1. Pick your niche.** Don't try to serve everyone. Pick one industry you know well (or want to learn). The more specific, the easier to market. *Example: "digital marketing agencies" → better than "all businesses."*
- ☒ **2. Define your ideal client.** Who specifically are you serving? What's their revenue? How many employees? What problem keeps them up at night? Write this down — it guides EVERYTHING else.
- ☒ **3. Choose your service offering.** What exactly are you selling? Be specific. Don't say "marketing services." Say "done-for-you GoHighLevel setup + 90-day management." One clear offer > five vague ones.
- ☒ **4. Set your pricing.** Research competitors. Price based on value delivered, not hours worked. Start at \$1,000-2,500/month minimum. You can always raise later — it's harder to raise from \$500 to \$2,000.
- ☒ **5. Register your domain.** Keep it simple — your name or your brand. .com preferred. Avoid hyphens, numbers, or clever spellings. This is your digital storefront.
- ☒ **6. Set up your brand basics.** Logo (simple is fine — Canva works), brand colors, a one-sentence tagline. Don't overthink this. You can refine later. Just be consistent.
- ☒ **7. Create your positioning statement.** One sentence that says who you help and how. Format: "I help [target client] achieve [result] through [method]." Example: "I help digital agencies replace their entire tool stack with one platform that automates lead capture, follow-up, and client delivery."



8. Set up business email. Get a professional email on your domain (Google Workspace or similar). name@yourdomain.com. Gmail/yahoo addresses signal "side hustle."



Phase 2: Infrastructure (Steps 9-18)

Build the machine. This is where GoHighLevel replaces 6+ tools.



9. Start your GoHighLevel free trial. 14 days, no credit card needed. This is your command center. Everything from here forward happens inside this platform.



10. Connect your domain to GoHighLevel. Settings → Domains. This lets you build landing pages and funnels on your own URL. Takes 10 minutes. Tutorials available if you get stuck.



11. Set up your email sending. Settings → Email Services. Connect your business email so automations can send from your domain. This is critical — without it, your emails go to spam.



12. Import the Pipeline Template. Use the Done-For-You Pipeline from the bonus resources. Settings → Import. This sets up your entire sales process — 5 stages, automated follow-up, the works.



13. Configure your calendar. Calendar → Settings. Set your availability, buffer times, and meeting types. This is what books calls automatically. Connect it to Google Calendar or Outlook.



14. Build your lead capture funnel. Funnels → Create New. Pick a template. Customize: headline, copy, opt-in form, thank-you page. Connect it to your pipeline. This is your 24/7 salesperson.



15. Create your lead magnet. A free resource people opt in to get. PDF guide, checklist, video training, or template. Make it genuinely useful — this is their first impression of your work.



16. Write your nurture email sequence. Automations → Campaigns. At minimum: welcome email (Day 0), value email (Day 2), case study (Day 5), and soft pitch (Day 7). Use the Swipe File for templates.



17. Set up SMS follow-up. Settings → Phone Numbers. Register your number. Create 2-3 SMS templates for key pipeline stages. SMS open rates are 98% vs 20% for email.



18. Test everything end-to-end. Submit a test opt-in. Watch it flow through the pipeline. Confirm: welcome email fires, calendar works, SMS triggers, thank-you page loads. Fix anything broken.



Phase 3: Client Acquisition (Steps 19-26)

Now that the machine is built — fill it with leads.



19. Identify 5-10 outreach targets. Make a list of potential clients in your niche. LinkedIn, industry directories, your network. Quality > quantity. Don't spray and pray.



20. Create your outreach template. Keep it short. "Hey [name], I help [niche] businesses [achieve result]. Saw your [something specific about them] — impressive. Got a quick idea for how you could [specific benefit]. Worth 15 minutes?"



21. Start building content. YouTube, blog, LinkedIn — pick one channel. Create content that answers your ideal client's questions. One piece per week minimum. This compounds over time.



22. Set up your discovery call process. What happens on the call? Have a structure: 5 min rapport → 10 min diagnosis → 10 min solution preview → 5 min next steps. Use the calendar booking link for scheduling.



23. Create your proposal template. One-page PDF or Google Doc. What you'll deliver, timeline, pricing, next steps. Don't overcomplicate it. Clients want clarity, not a 20-page deck.



24. Set up payment processing. GoHighLevel → Payments. Connect Stripe or PayPal. Set up invoicing and recurring billing. Get paid automatically — no chasing invoices.



25. Create your onboarding sequence. What happens the moment someone says yes? Welcome email, kickoff call booking link, questionnaire (if needed), first 30-day plan. Make it a Wow experience.



26. Land your first client. Use your outreach, your content, and your funnel. The first one is the hardest. After that, you have proof — and proof makes everything easier.



Phase 4: Scale (Steps 27-30)

You've got clients and proof. Now grow without breaking.

- ☒ **27. Collect testimonials.** After 30 days with a client, ask for a video or written testimonial. Make it easy — send them 3 questions to answer. One strong testimonial is worth 10 cold outreaches.
- ☒ **28. Build case studies.** Turn your best client results into 1-page case studies. Problem → Solution → Results. Use real numbers. This is your most powerful sales tool.
- ☒ **29. Set up a referral system.** Happy clients WILL refer you — if you ask. Create a simple referral incentive (discount, bonus, free month). Ask after you deliver a win, not before.
- ☒ **30. Raise your prices.** You've delivered results. You have testimonials and case studies. You're in demand. Raise rates by 25-50% for new clients. Existing clients stay at current rate (loyalty reward). Repeat annually.

You made it. 🎉

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