



AI AGENCY STARTER CHECKLIST

A practical checklist for starting, or tightening up, a small AI services business. From AI Service Playbook.

No hype, no promises. This checklist doesn't promise income or results. What you get out of it depends on your effort, your skills and your market.

1. Check the fit before you spend anything

- ☐ I can name the type of business I want to serve (for example: dental offices, roofers, local gyms).
- ☐ I know how many hours a week I can realistically give this.
- ☐ I'm willing to do outreach and sales conversations, not just build things.
- ☐ I'm comfortable learning new tools and fixing them when they break.
- ☐ My expectations are realistic. This is a service business, and finding clients takes time.

2. Pick one service and define it as a deliverable

- ☐ One service for one customer type. Examples: cleaning up and repurposing a business's existing content, writing lead follow-up message sequences, or building a simple monthly reporting dashboard.
- ☐ Write the offer in one sentence: "I deliver ___ for ___ within ___."
- ☐ List what's included and, just as important, what isn't.
- ☐ Set a turnaround time and a fixed number of revision rounds.
- ☐ Price it as a package, not by the hour. Decide the price before your first sales call.

3. Set up only the tools you need

Start small, and add a tool only when a real client need shows up.

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- ☐ Basics: a separate business email, a calendar booking link and a way to send invoices.
- ☐ Templates: one proposal template and one delivery-notes template you reuse.
- ☐ Automation, if your service connects apps (for example form, then CRM, then email): [Make](#) (affiliate link) builds these workflows visually.
- ☐ CRM or client platform, if you'll manage pipelines, follow-ups or client accounts: [HighLevel](#) (affiliate link) is built for agencies.
- ☐ AI voice, only if your service includes voiceovers, audio or voice agents: [ElevenLabs](#) (affiliate link).
- ☐ If you'll promote yourself or run campaigns for clients on TikTok: [TikTok for Business](#) (affiliate link).

4. Build one honest sample

- ☐ Build a sample of your deliverable for your own business, a made-up business or from public information, and label it clearly as a sample.
- ☐ Never present a sample as client work, and never invent results or testimonials.
- ☐ Write a short note: what it is, who it's for and what the client receives.

5. Reach your first 10 prospects

- ☐ List 10 businesses in your niche that have a public contact method.
- ☐ Write one short, specific message: something you noticed, the one thing you can help with and one small ask, such as a short call.
- ☐ Send one polite follow-up a few days later, then stop.
- ☐ Keep track of who you contacted and who replied, in a spreadsheet or your CRM.
- ☐ Follow each channel's rules and your local laws on commercial messages.

6. Quality-check every delivery

- ☐ **Verify facts:** names, prices, hours, addresses and any claims.
- ☐ **Match the brief:** it's what the client asked for, in the format they asked for.
- ☐ **Check tone:** it sounds like the client's brand, not like a generic AI.
- ☐ **Cut what you can't verify:** if you can't confirm it, delete it.
- ☐ **Protect client data:** get the client's OK before you put their information into an AI tool, and check each tool's data settings.

7. Paperwork and trust

- ☐ Use a simple written agreement covering scope, price, timeline, revisions, payment terms and who owns the finished work.
- ☐ Tell clients where AI is used in your process and that a person reviews every output.
- ☐ Get written permission before you show any client work publicly.
- ☐ Keep records of invoices and expenses from day one.

8. A short weekly review

- ☐ What did I send, who replied and what did I learn?
- ☐ What did prospects or clients ask for that I don't offer yet?
- ☐ What's one thing I'll improve next week?

Want a structured course? [The Instant AI Agency](#) (affiliate link, sold through ClickBank) is one option to review. I'm an affiliate, not the creator. Work through Section 1 first to decide whether it suits you.

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