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.

> **Disclosure:** Some links in this section are affiliate links. I may earn a commission if you purchase through my link, at no extra cost to you.

- [ ] 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 more? Get the free **First AI Service Offer Kit**, or the **AI Service Client Playbook** ($67) for templates that take a client from first call to handover. Neither is a promise of income or results.

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