FREE KIT FROM AI SERVICE PLAYBOOK

First AI Service Offer Kit

Fill-in worksheets for turning one AI or automation skill into one clear, fixed-price offer you can explain on a call and write up in a one-page proposal.

1. **Offer worksheet**
   Niche, problem, deliverable, scope limits, turnaround and price on one page.
2. **Fixed-package pricing worksheet**
   Find your cost floor from your own hours, hard costs and buffer, then choose a package.
3. **One-page proposal template**
   A plain-language scope the client can say yes to.
4. **Starter checklist (condensed)**
   The AI Agency Starter Checklist on one page: fit, tools, sample, outreach, quality and paperwork.

How to use this kit

1. Print it, or type into a copy. A spreadsheet version of the pricing worksheet is on the download page.
2. Fill in the offer worksheet for **one** service and one type of business. Resist adding a second.
3. Do the pricing worksheet before any sales call, so the call doesn't set your price for you.
4. Copy your answers into the proposal template. If a box is hard to fill, the offer isn't ready yet. That's useful to learn early.

No hype, no promises. This kit doesn't promise income or results, and it contains no example prices on purpose: your price depends on your market, your costs and your client. What you get out of it depends on your effort, skills and market. It isn't legal, tax or financial advice.

WORKSHEET 1

One-page offer worksheet

One service, one type of business. Answer in plain words a business owner would use.

Niche: who is it for?
One type of business, e.g. dental offices, roofers, local gyms.

Where will you find them?
Public directory, local area, a community you're already in.

The problem, in their words
What goes wrong today? Ask a few owners instead of guessing. Write what they actually said.

The deliverable: what exactly do they receive?
Something you can hand over and they can see, e.g. "a follow-up email + text for new web-form leads, a one-page delivery note and a 30-minute handover call."

Included

Not included (scope limits)
What they might assume you'll do.

Turnaround
Working days from receiving everything you need.

Revision rounds
How many, and what counts as a new request.

What you need from the client, and by when

Where AI is used + who reviews it
A person checks every output before it reaches anyone.

Price (from Worksheet 2)
Never below your cost floor.

Package shape
One-off setup / setup + care plan / monthly deliverable

Your offer in one sentence

I deliver _____ **for** _____ **within** _____ **working days.**

No income or results are promised.

WORKSHEET 2

Fixed-package pricing worksheet

Same method as the guide *How to price your first AI service as a fixed package*: count all your hours, add hard costs and a buffer, and never quote below the result. Use your own numbers only.

A. Hours, counted honestly (never delivered it? time a practice run for a made-up business first)

Task	Estimated hours	Actual hours (after delivery)
Sales call + writing the proposal		
Collecting logins, files and approvals		
Build		
Testing with sample data + quality check		
Revision rounds		
Delivery note + handover call		
Admin + invoicing		
Total hours		

B. Hard costs and your hourly value

Software share for this client (check each tool's official pricing page)	
Usage fees (texts, AI credits, etc.)	
Payment-processing fees	
Amount you set aside for taxes	
Total hard costs	
Your hourly value (decide it before the call)	
Buffer for unknowns (first deliveries usually run long)	

COST FLOOR = (total hours × hourly value) + hard costs + buffer = _____

C. Margin and package

Margin you add above the floor
For profit, risk and growth. Your call.

First quote (floor + margin)
Never below the cost floor.

Care plan covers / doesn't cover

D. Check it against the client

The client's own words on what the problem costs them

Result: accepted / declined (why?) / no reply

Your first price is a hypothesis: change one thing at a time. A spreadsheet version that does the math is on the download page.

TEMPLATE 3

One-page proposal template

Copy into your own document. Replace each [bracket]. Keep it to one page and promise the deliverable, not an outcome.

Proposal for: [Client business name] · **Prepared by:** [Your business name] · **Date:** [date] · **Valid until:** [date]

1. What you told me

[One or two sentences using the client's own words about the problem, e.g. "You mentioned new web enquiries sometimes wait a day or more for a reply."]

2. What I'll deliver

[Your one-sentence offer from Worksheet 1.]

Included: [item] · [item] · [item]
Not included: [item] · [item] (available separately on request)

3. Timeline and what I need from you

Delivery within [number] working days after I receive: [logins / files / approvals] by [date]. Includes [number] revision round(s). Changes outside this scope are quoted separately before any work starts.

4. How AI is used

I use AI tools for [drafting / sorting / summarizing]. A person reviews every output before it reaches you or your customers. I'll only put your business information into AI tools you approve.

5. Price and payment

Fixed price: [amount] for the deliverable above. [Optional care plan: [amount] per month, covering [list], not covering [list]. Cancel any time with [notice].]
Payment: [e.g. part up front, balance on delivery]. Work starts once this is signed and the first payment is received.

6. Ownership and handover

You own the finished work and all accounts it runs in. At handover you get [a delivery note + a [length] walkthrough call].

7. Next step

Reply "approved" or sign below, and I'll send the first invoice and the list of what I need.

Client name, signature and date	[Your name / business], signature and date

Tip: no guarantees of sales, leads or revenue. You control the quality of what you build, not the client's results. Use a proper written agreement for anything beyond a small first project. This template isn't legal advice.

CHECKLIST 4

Starter checklist (condensed)

The AI Agency Starter Checklist on one page. Tick each box before moving on.

1. Check the fit first

- [ ] I can name the type of business I want to serve.
- [ ] I know how many hours a week I can give this.
- [ ] I'm willing to do outreach and sales calls, not just build.
- [ ] I'm comfortable learning tools and fixing them when they break.
- [ ] My expectations are realistic: finding clients takes time.

2. One service, defined

- [ ] Offer worksheet (Worksheet 1) filled in.
- [ ] Included and not-included lists written.
- [ ] Turnaround and revision rounds set.
- [ ] Priced as a package (Worksheet 2) before the first call.

3. Only the tools you need

- [ ] Business email, booking link and a way to invoice.
- [ ] One proposal template and one delivery-note template.
- [ ] Automation, CRM or AI voice tools only when a real client need shows up.

4. One honest sample

- [ ] Built for a made-up business or from public info, and labeled as a sample.
- [ ] Never shown as client work. No invented results or testimonials.

5. Your first 10 prospects

- [ ] 10 businesses in your niche with a public contact method.
- [ ] One short, specific message with one small ask.
- [ ] One polite follow-up, then stop.
- [ ] Tracked in a spreadsheet; channel rules and local laws followed.

6. Quality-check every delivery

- [ ] Verify facts: names, prices, hours, claims.
- [ ] Match the brief and the requested format.
- [ ] Check the tone sounds like the client.
- [ ] Cut anything you can't verify.
- [ ] Client OK before their data goes into any AI tool.

7. Paperwork and trust

- [ ] Written agreement: scope, price, timeline, revisions, payment, ownership.
- [ ] Clients told where AI is used and that a person reviews it.
- [ ] Written permission before showing client work publicly.
- [ ] Invoice and expense records from day one.

8. Weekly review

- [ ] What did I send, who replied, what did I learn?
- [ ] What did people ask for that I don't offer yet?
- [ ] One thing to improve next week.

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