



 **Premium Action Guide**

Start and Scale a Lead Generation Business

A systems-first guide to pick a niche, package an offer, build outbound and inbound engines, close clients, and fulfill with automations—without bloated stacks.

 **Updated for 2026**  **≈20 min** client system setup (source-reported)

 **@jobhacki** · JobHacki Community



Start Fast

Clear first steps you can take this week.



Real Sources

Built from people who actually did it.



Honest Numbers

Source-reported pay, costs, and risks.

Get the Full Guide Vault →

 Includes checklists, scripts & source-backed insights

YOU WILL LEARN

- ☒ What you'll build
- ☒ Step 1 —  Pick a niche and a money-tied promise
- ☒ Step 3 —  Run a 5-day sprint to first audit calls
- ☒ Platforms & tools
- ☒ Step 2 —  Productize your offer into 5 workflows
- ☒ Step 4 —  Build a one-page offer site

What you'll build

A lean lead-generation agency that books qualified appointments and installs high-ROI automations for small and midsize businesses. You'll build a repeatable outbound engine, a simple inbound funnel, a client onboarding path, and a fulfillment stack of five revenue workflows.

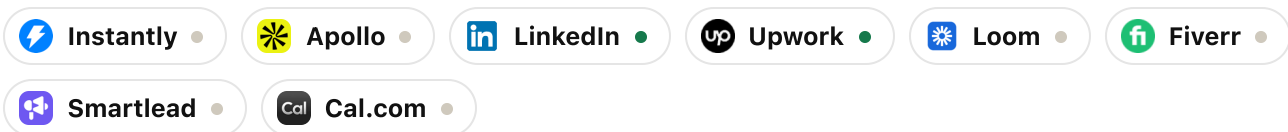
Everything is modular: pick a primary platform, bolt on supporting tools only where needed, and scale with retainers.

- 1 A productized offer built on 5 core workflows
- 2 An outbound machine (lists, icebreakers, sequences)
- 3 A speed-to-lead + nurture system that converts
- 4 Scripts for booking calls and handling objections
- 5 A metrics dashboard to optimize channel ROI

Platforms & tools

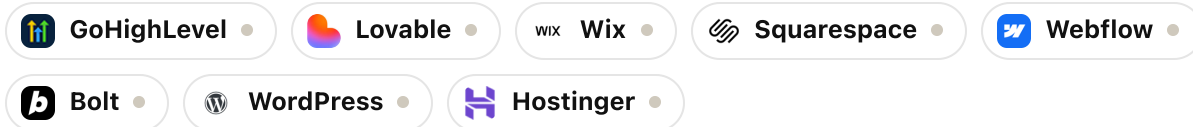
Lead & Outreach

2 free · 6 paid



Website Builders

0 free · 8 paid



AI Models

0 free · 5 paid



Dev & Hosting

0 free · 6 paid



Automation

1 free · 3 paid



► MODULE 03

Step 1 — 🎯 Pick a niche and a money-tied promise

Choose a vertical with high lead value and call volume (e.g., home services, legal, medical, coaching, real estate, SMB e-commerce). Define one clear outcome your system delivers, tied to revenue (e.g., “increase booked calls by 30%” or “40 qualified leads/month”).

Use AI to shortlist underserved sub-niches (e.g., drought-resistant landscaping, solar install, smart home, mold remediation). Commit to one ICP for 90 days.

Tip

Avoid low-ticket/low-volume niches (e.g., barber shops). Explain one simple system that solves a specific problem (e.g., never miss a call), not a menu of services.

► MODULE 04

Step 2 — Productize your offer into 5 workflows

Package a repeatable service around five business bottlenecks: speed-to-lead, follow-up/nurture, database reactivation, document processing, and internal reporting. Add an optional AI receptionist and review generation.

Price as deliverable-based retainers. Anchor with the client's annual outcome (common anchor: ~1/10 of annualized outcome). Offer tiers and a paid trial option.

Tip

Clients judge tangible deliverables (emails, calls, dashboards, configured assets). Name and show each workflow. Price savings-based projects at ~25–50% of documented savings.

► MODULE 05

Step 3 — Run a 5-day sprint to first audit calls

Day 1: Pick niche. Day 2: Find 20 businesses with expensive problems. Day 3: Draft audit questions. Day 4: Reach out to 100. Day 5: Book the first audit call.

Sell before building to compress cycles and learn fast.

Tip

Selling before building can shrink timelines from 6–7 weeks to ~9–10 days. Don't wait for a perfect stack.

► MODULE 06

Step 4 — Build a one-page offer site

Create a Minimum Viable Agency page with five sections: headline, what the system does, who it's for, how it works, single CTA. Keep copy concrete and outcome-tied.

Use your primary platform's page builder or any lightweight site tool. Publish with one CTA to book a call.

PROMPT — FAST SITE DRAFT

Copy the design from [DOMAIN]. But the new website needs to be for a business called [YOUR BUSINESS NAME], which is a business that builds [YOUR SERVICES] only within [YOUR SERVICE AREA]. Be sure to insert beautiful images of completed projects and list out the five to 10 biggest cities in your area. As well, there should be a form where people can request more info, too. Go.

Tip

Copy structure, not code. One CTA beats many. Use specific, money-tied promises; avoid jargon.

► MODULE 07

Step 5 — Choose your core platform

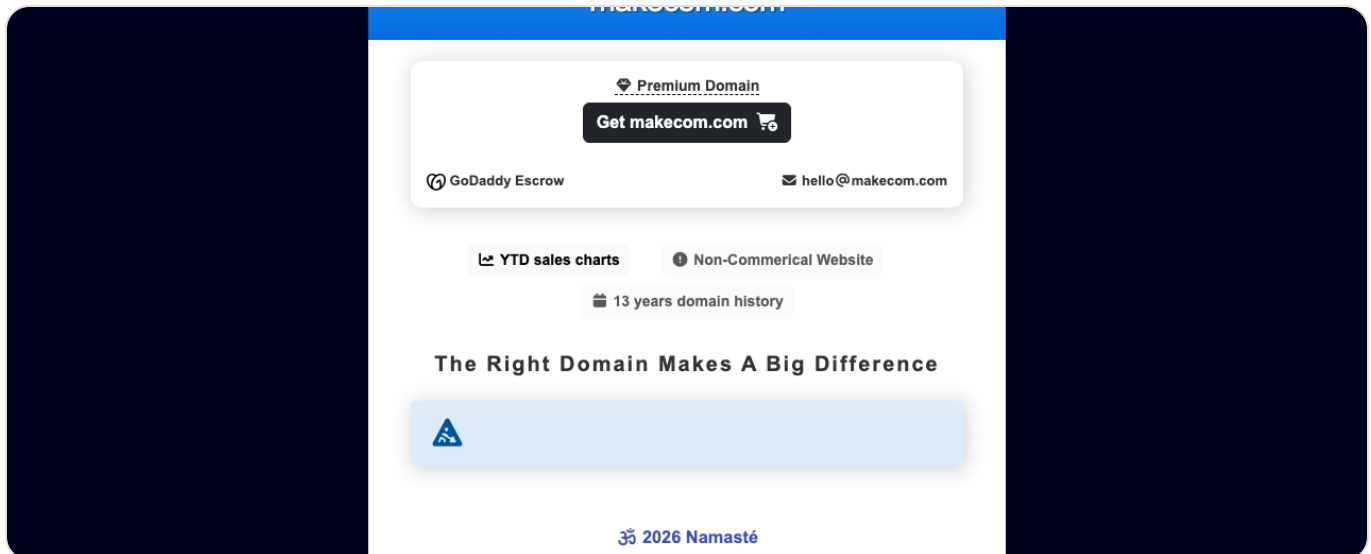
Pick one platform as your operating core based on your channel and fulfillment style. You can bolt on others later.

Platform	What to do in this step
GoHighLevel	Use as all-in-one: CRM, pipelines, automations, forms, calendar, AI receptionist, review flows.

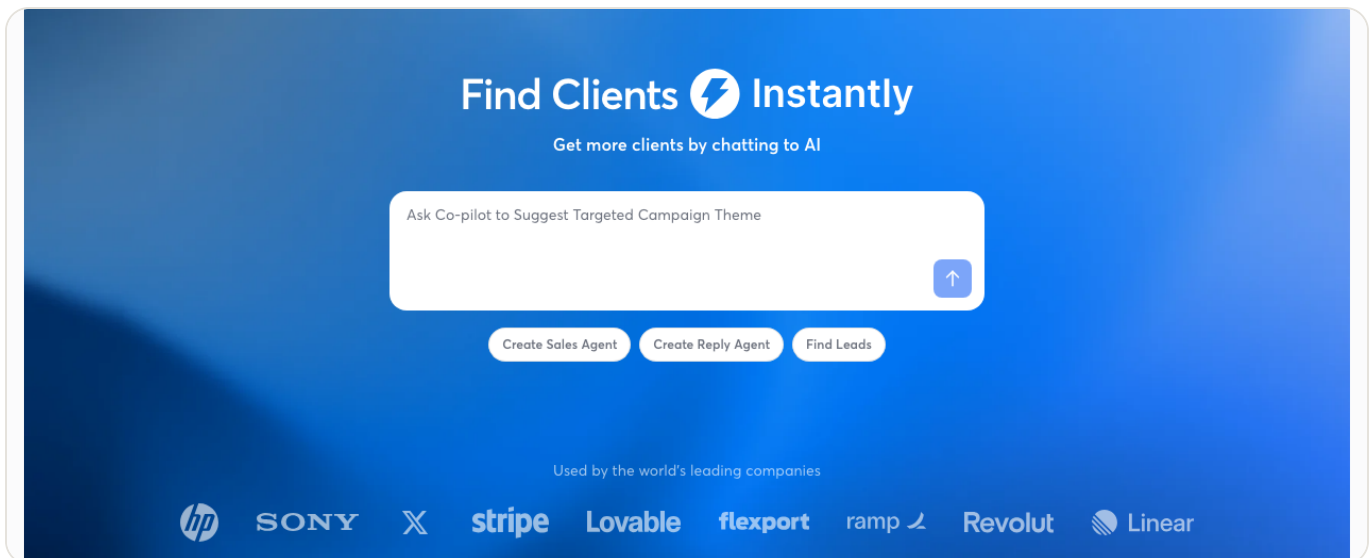
Platform	What to do in this step
Instantly	Use as outbound engine: cold email sending, warmup, inbox rotation, campaign analytics.
Apollo	Source and enrich contacts; build and send sequences; verify emails; track performance.
LinkedIn Sales Navigator	Build laser-filtered lead lists; do DM outreach; export to Sheets for email enrichment.
Make.com	Orchestrate multi-app flows (scrape, enrich, route, notify). Good for fast shipping.
n8n	Self-hosted automations for proposals, emails, and Gmail/Slides nodes with fine control.
Zapier	Quick automation glue for forms → CRM, Slack alerts, basic enrichment.

Tip

You don't need a "Ferrari" model for simple tasks. Pick the simplest tool that reliably does the job.



make.com — where you'll do this



Instantly — where you'll do this

► MODULE 08

Step 6 — 🌍 Source leads where they live

Match your source to your market: use LinkedIn Sales Navigator for white-collar B2B and Google Maps for local blue-collar/service businesses. Supplement with niche communities,

comment sections, and engaged YouTube creators selling low-ticket without a high-ticket funnel.

Use Apollo to find decision-makers and verified emails. For local, scan Google Maps listings for few/no recent reviews, missing info, or no website.

Tip

LinkedIn has strong anti-scraping. Favor filtered exports and semi-manual workflows over aggressive bots.

► MODULE 09

Step 7 — Build your lead sheet and fields

Create a 'Multi-line Icebreaker Generator' Google Sheet to hold research and outputs. Include: lead ID, search query, business name, category, address, phone, emails, owner/role, website, headline, location, enrichment status, and final multi-line icebreaker.

Store inputs and outputs in separate columns to enable QA and quick personalization at scale.

Tip

A VA sourcing 2,500 leads at \$10–15/hour often beats building a fully automated harvester early on.

► MODULE 10

Step 8 — Enrich and verify contacts

Enrich roles, direct emails, and socials via Apollo (and similar). Verify emails before mailing. If no verified email, try common patterns (first.last@, first@, firstl@).

Automation split: Scenario A—send prospects to an email finder/verification service; Scenario B—if verified, pass through AI enrichment to generate icebreakers and push to your sender (e.g., Instantly).

Tip

Filter out giant companies and recruiter listings; exclude URLs with “linkedin” in domain; limit employee counts for SMB ICPs.

► MODULE 11

Step 9 — Create personalized icebreakers with AI

Feed compressed website text, reviews, and social tidbits into an AI model (GPT-4.1/Claude). Return short, specific, human-sounding icebreakers as JSON. Fall back to a templated line if parsing fails, using whatever verified data you have (e.g., phone, city).

PROMPT – JSON ICEBREAKER (WEBSITE + LINKEDIN)

You are an SDR writing a 1–2 sentence, Spartan, specific icebreaker. Use PERSONAL nuggets from [LINKEDIN_PROFILE_TEXT] and concrete issues from [WEBSITE_TEXT]. Avoid generic company boilerplate. Return JSON only: {"icebreaker":"..."}.

Variables: {"first_name":"[FIRST]","company":"[COMPANY]","city":"[CITY]"}.

PROMPT – FALLBACK WHEN SITE NOT PARSED

Write a single casual line that still feels personal using: first name = [FIRST], business = [COMPANY], phone = [PHONE], city = [CITY]. No fluff, 18–28 words. Output plain text.

Tip

Personal beats corporate. Avoid generic company facts; hook on podcasts, backgrounds, recent posts, or obvious site gaps (e.g., no online booking).

► MODULE 12

Step 10 — Set up your outbound engine

Send value-first outreach across multiple channels (email, LinkedIn DM, IG/X DM). Use your lead sheet to mail in small daily batches, then scale. Add short delays between multi-touch steps.

Include a lead magnet or audit snippet to raise response quality, not just quantity.

Platform	What to do in this step
Instantly	Import CSV with personalized lines; rotate inboxes; set warm-up; create 3–5 step plain-text sequences; track opens/replies/meetings; A/B test.
Apollo	Build list + verify; launch sequences; use reply categorization; push interested to CRM; measure reply/meeting/cost per booked.
GoHighLevel	Create a pipeline; build email/SMS/VM workflows; route replies to opportunities; auto-book via calendar link.
LinkedIn Sales Navigator	Send customized connection requests; follow with 2–3 value DMs; export engaged to email sequences.
Make.com / n8n / Zapier	Trigger on Sheet row → verify email → generate icebreaker → send via Gmail/ESP → Slack notify on replies.

PROMPT – SHORT REPLY WRITER (FILL VARIABLES)

Write a 60–90 word, succinct email using: first name [FIRST], company [COMPANY], and our UVP from [WEBSITE_TEXT_SNIPPET]. Tone: direct, helpful, zero hype. End with one question to book a 15-min call. Output plain text.

PROMPT – EMAIL AGENT FOR LOOM AUDIT

System: Craft a helpful email that embeds a Loom thumbnail [LOOM_THUMBNAIL_URL] and links to the audit [LOOM_LINK], with a CTA to book at [BOOKING_LINK]. Be concrete about 1–2 issues spotted and expected impact on conversions. Keep it under 120 words.

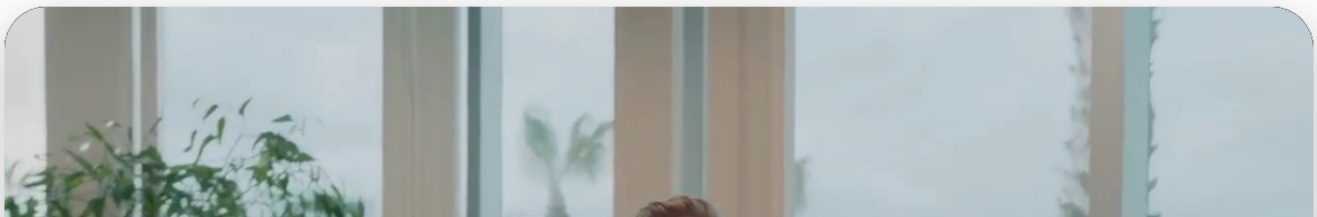
Tip

- Use plain text; HTML can break formatting.
- Don't use Mailchimp/Constant Contact for cold; they ban scraped/purchased lists.
- Your "From" name is the #1 open-rate lever.

One video is worth a thousand words

Easily record and share AI-powered video messages with your teammates and customers to supercharge productivity

Get Loom for free



Loom — where you'll do this

► **MODULE 13**

Step 11 — Create value-first assets (audits, demos, decks)

Lead with value that proves you can help. Record a 2–3 minute Loom audit tied to their revenue levers. If a site is missing/weak, spin up a quick mock page. For execs, include a short pitch deck highlighting problems and quantifying outcomes.

AUDIT LOOM – 3-PART STRUCTURE

Intro (15s): "[NAME], I dug into [BUSINESS]. Found a couple quick wins."

Evidence (60–90s): show Google listing, reviews, top competitors, and 1–2 site issues. Fix (30s): explain the biggest bottleneck and how you'd solve it; no-pressure close with a booking link.

PROMPT – PITCH DECK (5–10 SLIDES)

Create a 5–10 slide deck for [NICHE] in [CITY] showing concrete problems in their online presence and how AI automation would increase bookings by 15–30%. Put 1–2 pain points per slide; solutions toward the end; one clear next step (book a call).

Tip

The bar for value in cold outreach is rising. A short, specific asset beats a generic personalized email.

► MODULE 14

Step 12 — Warm network activations

Start where trust exists. Message neighbors, past coworkers, and friendly local owners. Offer to walk them through your system for free and record results as case studies. Ask for intros.

TEMPLATE – NEARBY NETWORK

Subject: [Personalized hook for [Name]]

Hey [NAME]. I just started helping [TYPE OF BUSINESS] get [SPECIFIC RESULT]. Do you know anyone who might need that?

TEMPLATE – WARM POST (UPGRADE)

Subject: [Personalized hook for [Name]]

Hey, I'm looking to help five [NICHE] owners get 10–15 leads per month using a simple 3-step system (no ads). If that sounds useful, DM me and I'll walk you through it free.

TEMPLATE – POC TO AN EXISTING CONTACT

Noticed [TIME-WASTING PROBLEM] at [BUSINESS]. I built a tiny proof-of-concept to fix it. Want me to show you the 2-minute demo?

Tip

Micro-triggers work: end posts with a simple “Comment [WORD] and I'll send you the checklist” to spark conversations and tagging.

► MODULE 15

Step 13 — Proven scripts that book calls

DM/EMAIL – MISSED AFTER-HOURS LEADS

Subject: [Personalized hook for [Name]]

Hey [NAME], I noticed you might be missing leads after business hours (nights/weekends). I help businesses automate lead follow-up with AI so you book more appointments automatically. Want me to send a 30-sec demo?

DM – IF SITE EXISTS

Subject: [Personalized hook for [Name]]

Hey [NAME], I was searching for [NICHE] in [CITY] and came across your site—great reviews btw. I found a few things that might be costing you leads, so I mocked up an optimized version for more calls/customers. Ok if I send the link?

DM – IF NO WEBSITE

Subject: [Personalized hook for [Name]]

Hey [NAME], I was trying to find your website when searching for [NICHE] in [CITY], but couldn't find one. Bit out of nowhere, but I went ahead and built you one. Want me to send the link to check it out?

PHONE HOOK – FREE AI AUDIT

Subject: [Personalized hook for [Name]]

Hey, this is [YOUR NAME] from [AGENCY]. We work with [NICHE] in [REGION]. We're offering free AI audits to [NICHE] owners right now to show exactly how others are booking more appointments.

AI RECEPTIONIST PITCH

Subject: [Personalized hook for [Name]]

Hey [NAME], noticed you're missing calls after hours. I can add an AI receptionist that answers every call, books appointments automatically, and makes sure you never lose another lead. Setup takes ~10 minutes. Want me to add it?

NICHE HOOK EXAMPLE

Subject: [Personalized hook for [Name]]

Hey, I help [DENTISTS] turn website visitors into booked appointments without spending more on ads. Open to seeing how that might work for your office?

LINKEDIN CONNECTION

Subject: [Personalized hook for [Name]]

Hey [FIRST NAME]—saw [CASUAL COMPANY NAME]. Think we'd vibe given our interests. Would love to connect.

ASK FOR THE SALE (SIMPLE)

Subject: [Personalized hook for [Name]]

Hey [NAME], are you ready to move forward with [SERVICE] tomorrow?

Tip

Sending a 1-minute Loom before the meeting boosts show rates and takes ~5 minutes to prepare.

Step 14 — Objection handling that opens doors

NOT INTERESTED / ALREADY HAVE SOMEONE

Totally. Most businesses I work with already had someone, too. Would it be okay if I showed you one thing we do differently—just so you have something to compare to? No pressure either way.

WE TRIED THIS BEFORE

That's actually useful to know. A lot of teams said the same thing before we started. Usually the issue is the system, not the idea. Okay if I show exactly how we handle that so you can see what's different?

NOT LOOKING / BAD TIMING

Totally understand—timing matters. All right if I send you one quick thing that'll be useful whenever the timing's right? Takes ~2 minutes to review. No pressure.

IF THEY SAY NO AFTER THE HOOK

No worries. Out of curiosity, is AI on the radar for you? Something you've explored at all?

FREE AUDIT EXPLAINER (VALUE TRANSPARENCY)

It's a quick 15-minute call where we show how others in your industry are using AI. We do it free because most businesses will adopt AI in the next 12–18 months, and we're building relationships early so you have a contact when the time comes. Does a 15-minute call sound fair?

Tip

Most people either retreat or argue. Invite a small next step instead—"one thing we do differently."

► MODULE 17

Step 15 — Run discovery calls that convert

Use a simple SOP: build rapport, ask why your email stood out, dig into problems and costs, confirm urgency, share relevant experience/results, demo a solution, and pitch or send a proposal. Keep talk ratio focused on them.

Time split: ~70% discovery, 20% solutions framed by outcomes, 10% next steps/objections. Collect structured info live via a short form.

ON-CALL INTAKE (TYPEFORM OR IN-CRM FORM) – FIELDS

First name, Last name, Email, Company, Business description, Primary problem, Proposed solution, Platforms/services to use, Timeline, Pricing expectation, Decision process, Next step.

Tip

Avoid deep tech (SEO tags, prompt lore). Prospects buy outcomes, not internals. A simple slide deck keeps control.

Step 16 — Proposals, pricing, and trials

Send a clear, deliverable-based proposal (e.g., speed-to-lead, follow-ups, review system, reactivation, reporting). Offer a small paid trial or one-time project first, then convert to retainer.

Common tiers: \$500/month (AI website + basic automation), \$1.5k–\$2k/month (lead gen + ads), \$2.5k–\$3k/month (full suite including Ads/SEO).

PROMPT – PROPOSAL CONTENT JSON (FOR PANDADOC/SLIDES)

Generate a proposal JSON with keys: `client_profile`, `objectives`, `scope_of_work` (5 workflows), `timeline`, `success_metrics`, `pricing_tiers`, `case_studies`, `assumptions`, `risks`, `acceptance`. Input: `[CLIENT_NOTES]`, `[NICHE]`, `[RESULT_TARGET]`, `[TIMELINE]`. Focus on revenue outcomes and speed-to-lead.

Tip

Converting a one-time project to a retainer often outperforms cold-to-retainer. Legal boilerplate adds friction; a paid start + money in the account is a stronger signal.

Step 17 — Onboard fast and set expectations

Run a short onboarding call: thank them, share the call cadence, timelines, communication norms, platform access, 2FA logistics, and Q&A. Automate intake forms, account setup, welcome email, calendar booking, and branded docs.

Overdeliver early and ask for permission to document results as a case study.

ONBOARDING CALL OUTLINE

1) Thanks/recap goals 2) Schedule/cadence 3) Timeline/milestones 4) Communication channels and SLAs 5) Platform signups + 2FA 6) What we need this week 7) Q&A 8) Next check-in.

CASE STUDY ASK

Subject: [Personalized hook for [Name]]

Hey [CLIENT NAME], I'm glad we achieved [SPECIFIC RESULT]. Would you mind if I documented this as a short case study to help others in your situation?

Tip

Clients expect more communication than they get. Proactive updates increase retention and upsells.

► MODULE 20

Step 18 — Implement the 5 core automations

- Speed-to-lead: capture, auto-qualify, route, and instant follow-up in seconds.
- Follow-up/nurture: personalized multi-touch sequences; stop on reply/booking.
- Database reactivation: segment old contacts by last touch and restart conversations referencing history.
- Document processing: extract invoice/form data, validate, flag anomalies, push to the right system.
- Internal reporting: pull data across systems, analyze, and notify teams where they already work (e.g., Slack).

Platform	What to do in this step
GoHighLevel	Use forms/chat/phone to capture; workflows for speed-to-lead and multi-touch; missed-call text-back; review gen; AI receptionist; pipeline + stage-based automations; dashboards.
Make.com	Trigger on form/webhook → qualify → route to Slack/CRM → Gmail SMS API for instant follow-up; schedule reactivation batches; build reporting jobs; add sleep delays between touchpoints.
n8n	Build node flows: email/SMS (Gmail/Twilio equivalent), segmenters, Google Slides for decks, Google Sheets for logs, state machine on statuses; monitor pipeline changes and trigger paid-trial requests.
Zapier	Quick glue: form → CRM; CRM stage change → email; event → Slack digest; spreadsheet → reactivation emails.
Instantly/Apollo	Use for follow-up and reactivation campaigns; import segmented CSVs; track replies and meetings.

Tip

Respond within 5 minutes—you're up to 10× more likely to convert vs. 30 minutes later (source-reported).

Google Sheets — where you'll do this

► MODULE 21

Step 19 — Build agentic workflows (proposals to replies)

Automate fulfillment steps with AI: proposal generation, onboarding emails, lead scraping/enrichment, campaign drafts, and reply handling. Use the DO framework: Directive (clear prompts + variables), Orchestration (agent manages steps), Execution (scripts/tools carry them out).

Set model to GPT-4.1 for writing tasks. Start in plan mode (ask clarifying questions) before enabling autonomous runs.

PROMPT — REPLY ASSISTANT (EMAIL CATEGORIES TO SLACK)

You're an SDR assistant. Categorize replies as Positive/Neutral/Not Interested/Bounce and extract: meeting times, objections, intent, sentiment. Return JSON only. If Positive with time, tag #meetings; if objections, tag #objections. Input: [EMAIL_THREAD].

PROMPT — PERSONALIZED VIDEO SCRIPT

System: Create a 45–60s video script that starts with: "Hey this is [YOUR NAME] from [AGENCY]" and uses [LEAD_INFO] to point out 1–2 specific issues and a single next step to book at [BOOKING_LINK]. Keep it plain, specific, and confident.

Gmail API setup: in Google Cloud Console create a project, enable Gmail API, configure OAuth consent, publish app, and create OAuth client credentials for your automation tool's redirect URL. In Make.com, use the OAuth2 module with client ID/secret, auth and token URIs, and the platform's redirect URL.

Tip

- AI is flexible—set guardrails (schemas, short outputs).
- Define eval criteria (e.g., legibility, relevance).
- Fix unknown mailbox errors by connecting a valid mailbox and correct folder.

► MODULE 22

Step 20 — Test, delay, and harden your automations

Prototype fast, then run a one-week internal QA with sample and real datasets. Add sleep/delay modules to space send steps and avoid throttling. Handle nulls, wrong data types, and missing fields gracefully.

Give clients a one-week QA period to collect edge cases, then patch. Monitor success rates per step—small failures cascade.

Tip

If each of 5 steps succeeds 90% of the time, end-to-end success can fall to ~59% (source-reported). Add retries and fallbacks.

► MODULE 23

Step 21 — Track channel economics and improve

Track per-channel: open rate, reply rate, CTR, positive responses, booked calls, conversion rate, cost per lead, cost per acquisition, proposals sent/accepted, and closed revenue. Compare outbound channels (email, LinkedIn, DMs) to inbound content.

Use simple dashboards (Sheets + charts) and automated weekly digests to make decisions.

Tip

Reply rate benchmarks (source-reported): <2% bad, 2–5% improve copy, 5–10% golden, >10% excellent. Measure with no human bias—e.g., Google Lighthouse for site speed, API analytics for reply parsing.

► MODULE 24

Step 22 — Build your watering hole (inbound)

Publish weekly for 90 days: one video per week with a relevant lead magnet and one helpful weekly email. Choose channels by market: LinkedIn (B2B), Instagram (<40 consumers), Facebook (local/older), YouTube (video/how-tos).

Drive all content to one opt-in page; tag by source; send a short nurture sequence with your best assets. Use commitment/consistency: small asks (comment 'CHECKLIST') to increase further engagement.

PROMPT – SOCIAL POST GENERATOR

Topic: [TOPIC]; Short description: [DESC]. Generate 10 post ideas with captions and an image concept each for [PLATFORMS]. Keep posts educational, tie back to [LEAD_MAGNET], and end with a simple CTA.

Tip

Media amplifies what's there—if your offer is unclear, it amplifies confusion. Fix the offer first.

► MODULE 25

Step 23 — Optional: win clients on Upwork fast

Complete your profile (video, languages, education, portfolios, skills, project catalog, testimonials, certs, employment). Use a bright, centered photo; keyword-rich titles; front-load social proof; keep your online badge active.

Apply to 3–5 jobs daily with a custom Loom and a small bespoke asset. Send the asset both via the proposal and any listed contact channel.

PROMPT – JOB FILTER FOR YOUR AGENCY

Given our services [SERVICES] and ICP filters [FILTERS], evaluate this job post: [JOB_POST]. Return JSON: {"relevant": true|false, "why":"...", "next_action":"..."} with brief reasoning.

COLD EMAIL PATTERNS (USE WITH CARE)

Subject: I will get you 20 booked meetings in the next 60 days or you don't pay
I will generate you 20 booked appointments in the next 60 days or you don't pay.

SUBJECT: I will help you close \$10,000 in the next 30 days or I'll keep working for free until I do
I will help you close \$10,000 in the next 30 days or I will continue working for free until I get them for you.

SUBJECT: I will write your next client 100 free SEO and AI optimized blog posts
I will write your next client 100 free SEO and AI optimized blog posts... Only if you absolutely love it would I ask you to pay.

SUBJECT: I will completely automate brand sniping for your next campaign for \$0
I will completely automate brand sniping... It'll cost you nothing and only if you love the system would I ever ask you to pay.

LOOM-FIRST APPLICATION OPENER

Subject: [Personalized hook for [Name]]

Hey [NAME], I saw your post about [TASK]. I recorded a 2-minute Loom walking through a working draft and exactly how I'd finish it. If helpful, I can wrap this up quickly and plug it into your stack.

Tip

Being upfront about being new can earn leniency. Not filling profile sections hurts ranking. Don't over-optimize tech—ship bespoke value.

► MODULE 26

Step 24 — Retain, expand, and systematize

Track wins and turn one project into many. Offer ongoing optimization, add stakeholders, and systematize comms. Classify opportunities by timing: kitchen table (soon), refrigerator (months), freezer (year).

Gradually shift from chase to inbound: months 1–3 outbound + content; months 4–6 mixed; months 7–12 mostly inbound + referrals.

Structure retainers around packaged deliverables (weekly strategy calls, priority plans, daily availability, training, unlimited maintenance). Price consistently but allow strategic discounts with a clear anchor.

Tip

Retention > acquisition. Increase proactive communication and ship small wins frequently to justify premium pricing.

► MODULE 27

Step 25 — Compliance, deliverability, and reliability

- Don't use marketing ESPs (Mailchimp/Constant Contact) for cold outreach; they ban scraped/purchased lists.
- Send plain text; HTML can render on one line. Warm domains; use horizontal scaling (more inboxes, fewer sends each).
- Avoid heavy scraping on protected sites; use official filters/exports. Test with small batches before scaling.
- Back up data; handle throttling with delays; route categorized replies to Slack; document your runbooks.

Tip

Use only parts of your script for AI personalization; full AI-written emails can feel flamboyant. Keep tone tight and human.

► MODULE 28

Income Forecast

**\$500–\$5,000/mo
per client**

Typical SMB AI/lead-gen service pricing
(source-reported/example)

**\$500 / \$1.5k–\$2k /
\$2.5k–\$3k**

Common monthly tiers from basic to full suite
(source-reported/example)

9%+

Cold → one-time → retainer overall conversion
when using trials first (source-
reported/example)

\$25,000/mo

Example: five clients at \$50k/yr + \$50k
one-time projects, annualized (source-
reported/example)

Outcome ÷ 10

Pricing anchor: ~1/10 of annualized outcome
value (source-reported/example)

15–30%

Illustrative booking uplift from core automations
in decks (source-reported/example, not
guaranteed)

► MODULE 29

Resources

RESOURCES

 **Meta Ads Library**

Research competitor ads and angles. 

 **Gmail API documentation**

Set up programmatic email access. 

 **Google Lighthouse**

Audit site performance as a measurable eval. 

 **FTC CAN-SPAM**

Email compliance reference (US). 

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| 21 Step 19 — 🗣️ Build agentic workflows (proposals to replies) | 22 Step 20 — ✍️ Test, delay, and harden your automations |
| 23 Step 21 — 🇮🇹 Track channel economics and improve | 24 Step 22 — 📢 Build your watering hole (inbound) |
| 25 Step 23 — 📦 Optional: win clients on Upwork fast | 26 Step 24 — 📈 Retain, expand, and systematize |
| 27 Step 25 — ✅ Compliance, deliverability, and reliability | 28 Income Forecast |
| 29 Resources | |



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