JobHacki
OPPORTUNITY GUIDE

⚡ **Premium Action Guide**

Build and Sell AI Chatbots for SMBs

Launch a client-ready chatbot/voice-agent service with no-code builders, clear prompts, and repeatable delivery. Package it for retainers and grow with agentic workflows.

📌 **Updated for 2026**

🧾 **$500–$5,000+/mo** Typical monthly retainer per client (source-reported/example-only)

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🚀 **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

- [x] What you'll build
- [x] Platforms & tools
- [x] Step 1 — 🧭 Choose a niche and offer
- [x] Step 2 — 🗺️ Decide your build type
- [x] Step 3 — 🧰 Pick your primary builder
- [x] Step 4 — 🔐 Connect Google Sheets and Gmail (OAuth)

▸ MODULE 01

What you'll build

A client-facing AI chatbot/voice-agent service that captures leads, answers FAQs from policy docs, sends follow-ups, books appointments, and delivers daily insights. You'll build on one of several primary platforms, connect data (Sheets/Docs), add guardrails, embed on client sites, and package it into retainers.

You'll also set up outreach, pricing, onboarding, metrics, and scale paths with agentic workflows.

1. A deployable chatbot + optional voice receptionist
2. RAG from Google Docs + website sitemaps
3. Automated follow-ups via email/SMS with Sheets logging
4. Daily research briefs sent to inbox/Slack
5. Pricing, outreach, onboarding, and KPI tracking

▸ MODULE 02

Platforms & tools

Lead & Outreach

2 free · 6 paid

Cal.com · Upwork · Instantly · Apollo · Loom · LinkedIn · Fiverr · Smartlead

Website Builders

0 free · 8 paid

Hostinger · Lovable · GoHighLevel · WordPress · Bolt · Webflow · Framer · Carrd

AI Models

0 free · 5 paid

OpenAI · Claude · Gemini · ChatGPT · Anthropic

Dev & Hosting

0 free · 6 paid

VS Code · GitHub · Vercel · Supabase · Cursor · Replit

Automation

1 free · 3 paid

Make.com · n8n · Zapier · Apify

▸ MODULE 03

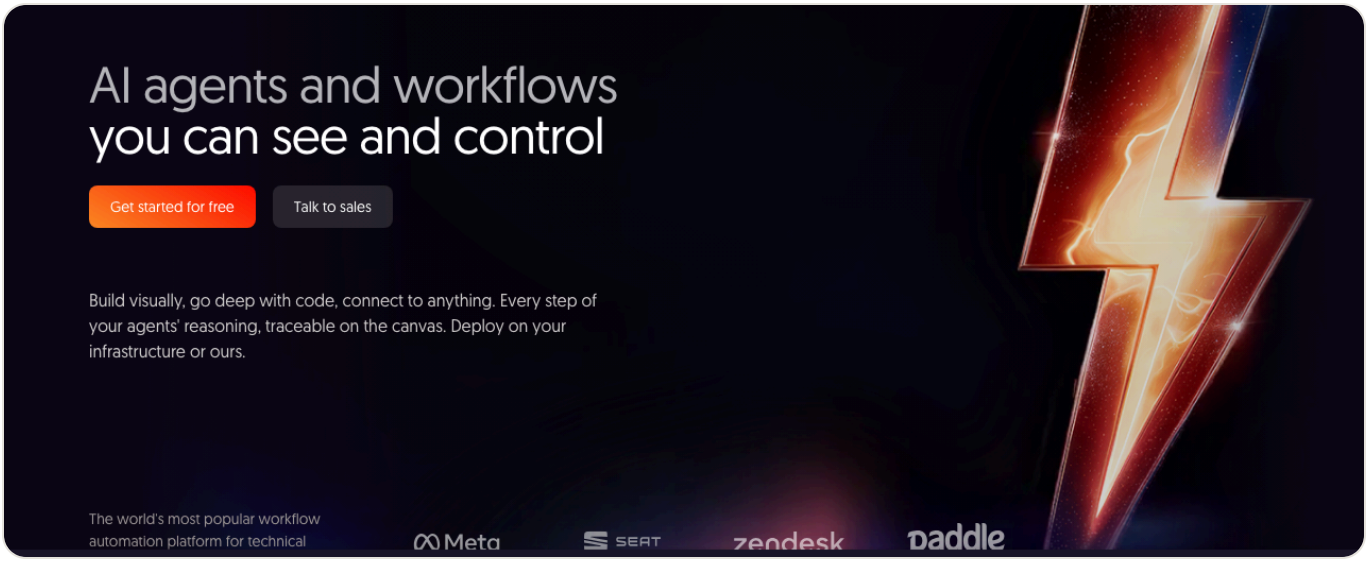
Step 1 — 🧭 Choose a niche and offer

Start narrow so your demos feel instant and relevant. Common winners: AI receptionist for missed calls, lead follow-up and booking, FAQ/returns bot for e-commerce, or research/briefing assistant for founders.

Map solution levels: Level 1 existing AI features, Level 2 integrations via no-code (Make/n8n/Zapier), Level 3 custom multi-agent builds. Begin at Level 2 for speed, then graduate.

Tip

Clients judge tangible outputs (emails, texts, bookings, reports). Lead generation solves most agency problems; 50% of quick wins don't need AI at all—add AI only where decisions are needed.



N8N — where you'll do this

▸ MODULE 04

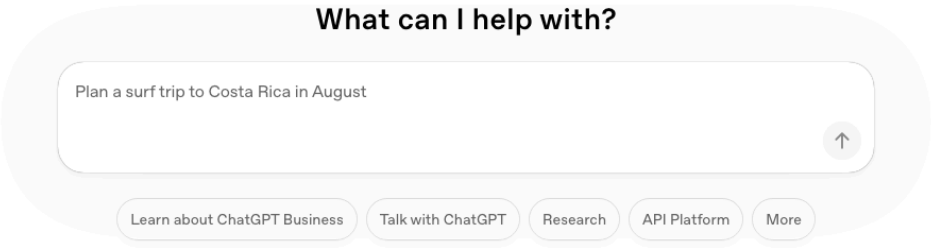
Step 2 — 🗺️ Decide your build type

Use this decision tree: if you must stay in the loop, build a Custom GPT; if steps are 100% logic-based, build a workflow; if order is fixed but needs AI choices, build an AI workflow; if you need autonomy and flexibility, build an AI agent.

Pick models per task: lightweight for content, reliable for user chat, reasoning-heavy for agents. Avoid one-model-for-everything.

Tip

Claude shines on complex agentic coding; OpenAI is great for user-facing chatbots; Gemini offers large context at sharp value. Use mixed models to optimize cost/performance.



OpenAI — where you'll do this

▸ MODULE 05

Step 3 — 🧱 Pick your primary builder

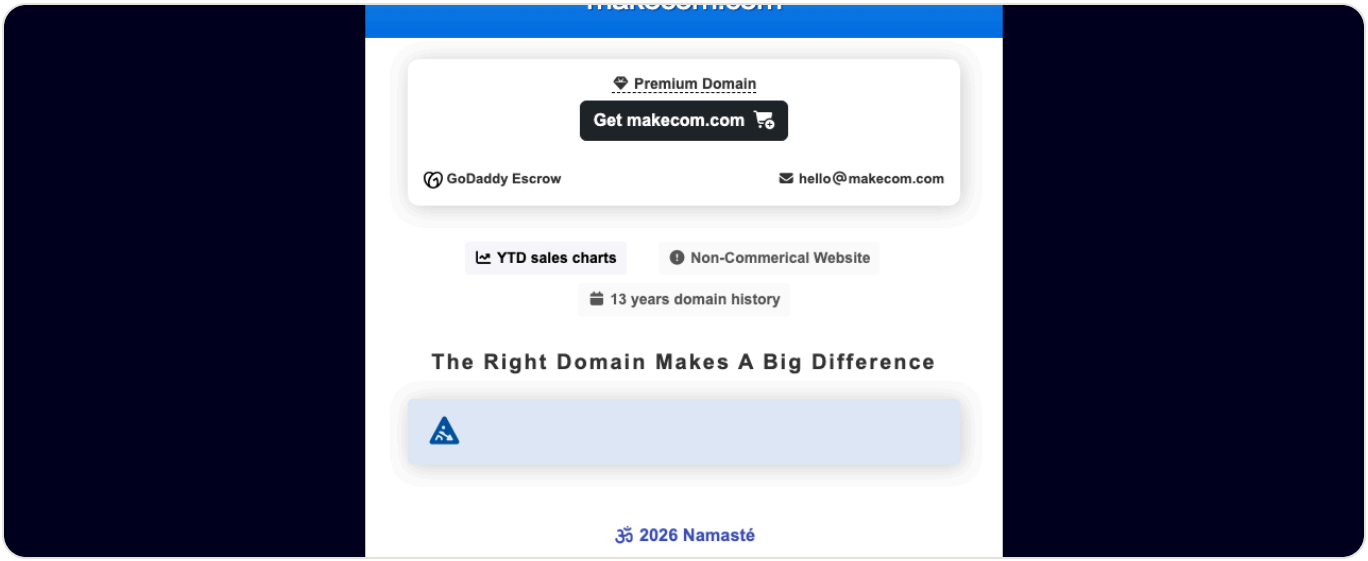
Choose one platform to ship your first paying use case. You can add others later. Do the minimum to create a workspace and a starter bot/flow.

Platform	What to do in this step
Make.com	Create a new scenario. Add a Webhook trigger. Add OpenAI/Gemini modules. Add Google Sheets and Gmail modules. Save a first draft flow.

Platform	What to do in this step
n8n	Create a new workflow. Add a Webhook (or Gmail) trigger. Add OpenAI node. Add Google Sheets and HTTP/Gmail nodes. Save and enable.
Zapier	Create a new Zap. Add Email/Webhooks/Forms trigger. Add OpenAI action. Add Google Sheets and Gmail actions. Turn on the Zap.
Lindy	Create a new agent/SDR. Define skills (find, qualify, email, handle objections). Configure context stacking. Connect email/calendar.
ChatGPT (Custom GPTs)	Create a Custom GPT. Add instructions, knowledge files/links. Add Actions only if you'll operate it manually (not for background automations).
Retail AI	Create a voice agent. Choose inbound/outbound. Name the agent. Reserve/provision a phone number (complete any identity verification).

Tip

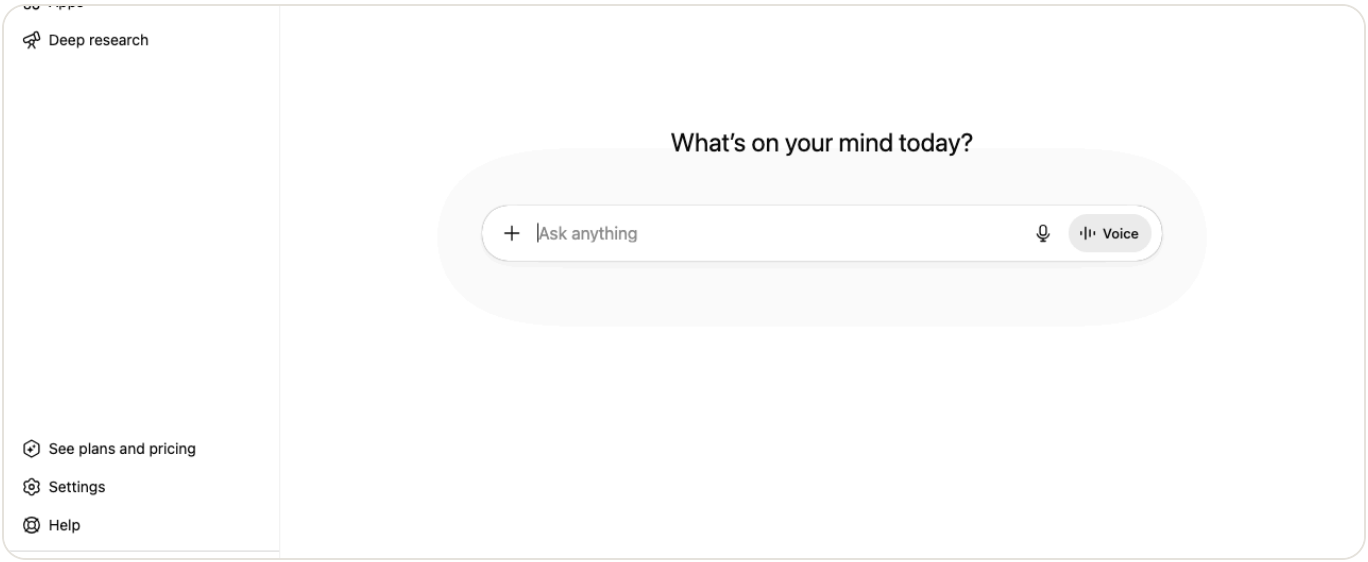
Starting with Make.com often yields 2–3× revenue sooner vs. more technical stacks; host n8n when you need more control or lower unit costs.



Make.com — where you'll do this



Google Sheets — where you'll do this



ChatGPT — where you'll do this

▸ MODULE 06

Step 4 — 🔐 Connect Google Sheets and Gmail (OAuth)

Create a Google Cloud project, enable Google Sheets API and Gmail API, configure an OAuth consent screen (External, your email), and create OAuth client credentials for a Web application. Add your platform's redirect URI. Paste Client ID/Secret into your platform and sign in.

For custom providers, use a generic OAuth 2.0 module: set Authorization URI, Token URI, Client ID/Secret, and redirect URL supplied by your platform.

REFERENCE

Google OAuth credentials — Create project, enable APIs, set OAuth ↗

Tip

Google may show an unverified app warning—use Advanced > Continue if you're the developer. If your tool lacks native OAuth, use its generic OAuth 2.0 module.

▸ MODULE 07

Step 5 — 🗃️ Build your data backbone in Sheets

Use one Google Sheet as your single source of truth. Create tabs for Leads (name, email, phone, source, status, last_touch, next_action), Conversations (timestamp, channel, direction, message, agent, outcome), Bookings (contact, time, link, status), and Settings (templates, toggles).

Optionally add marketing tabs: Source Posts (id, url, author_url, posted_date, img1-3), Destination Posts (generated, orig_url, created_at, status), and Icebreakers (url, first_name, last_name, company, email, headline, location, phone, multi_line_icebreaker).

> **Tip**
>
> Always filter by the incoming phone/email before passing records to agents—otherwise agents mix users. Sheets are easier for client edits; n8n data tables are faster for small writes.

▸ MODULE 08

Step 6 — 🤖 Build the core lead follow-up bot

When a new lead arrives, personalize a follow-up, log it, and nudge to book. Use your Sheet as memory, and Gmail/SMS as channels. Add simple rules (e.g., if no reply in 2 hours, send gentle bump).

Platform	What to do in this step
Make.com	Trigger: Webhook/Form/Email. Enrich (Apollo if needed). Generate message with OpenAI (JSON output). Send via Gmail/SMS. Log to Sheets (append).
n8n	Trigger: Webhook/Gmail. Fetch/enrich. OpenAI node (system+user prompts). Gmail or HTTP for SMS. Append to Sheets. Add Delay nodes for cadences.
Zapier	Trigger: Email Parser/Form. Formatter for fields. OpenAI action to draft. Gmail/SMS action to send. Google Sheets Append Row.
Lindy	Use AISDR template. Connect inbox. Configure qualify → personalize → send → handle objections → book. Log outcomes to Google Sheets via integration/webhook.
ChatGPT (Custom GPTs)	Create an operator-assist GPT for manual outreaches; add knowledge, tone, and email templates. Use it to produce highly targeted messages you paste into your outreach tool.

Platform	What to do in this step
Retail AI	Skip here—use Step 7 for voice follow-up (outbound calls or missed-call text-back).

PROMPT — LEAD FOLLOW-UP (B2C LOCAL SERVICES)

```
System: You are an AI lead follow-up assistant for [BUSINESS NAME]. Goal:
quickly confirm interest, answer basic questions, and book a [APPOINTMENT TYPE]
using [BOOKING LINK]. Use short, friendly language.
User context:
- Lead: [FIRST NAME], [SERVICE INTEREST], [SOURCE], [NOTES]
- Business: [CITY], [HOURS], [PRICE RANGE]
Rules:
1) Personalize the first line using [SOURCE] or [NOTES].
2) Offer two time windows pulled from [HOURS]; include [BOOKING LINK].
3) If asked about price, give range and invite to call.
4) If no response in 2h, draft a gentle bump.
Output JSON: {"subject":"...","message":"...","next_bump_in_hours":2}
```

Tip

Keep templates predictable; have AI fill small portions. This increases reliability and keeps brand voice tight.

▸ MODULE 09

Step 7 — 📞 Add a voice AI receptionist (optional)

Offer a phone-based agent to capture missed calls and book appointments. Configure call behavior, transfer logic, and pre-call SMS. Connect it to your workflow for logging and alerts.

PROMPT — UNIVERSAL VOICE AGENT SCRIPT

```
System: You are a polite AI receptionist for [BUSINESS NAME]. Greet callers,
mention context if available ([LEAD_SOURCE]/[RECENT_FORM]). Confirm details,
answer FAQs from [POLICY/FAQ DOC], overcome common objections, and book a time
via [BOOKING LINK] or transfer to [HUMAN_NUMBER] if asked. End every call with
a clear next step.
Functions available: end_call(), transfer_call(to="[HUMAN_NUMBER]")
Rules:
- If voicemail detected: leave a 20–30s concise message with callback number.
- If caller asks for a human: transfer_call.
- If idle >30s: politely end_call.
- Never read placeholders; only speak values passed.
```

Configure in Retail AI: responsiveness ~0.8–0.95, interruption sensitivity ~0.8, backchanneling on, speech normalization low, end-on-silence 30–60s, ring 30s, max call 12–20min. Set call transfer as a global node so the agent can transfer from anywhere.

Connect your workflow: use HTTP Request from your automation with JSON {from, to, callType:"phone", agentId, variables…}. Send a pre-call SMS like “Hi [NAME]—[AGENT NAME] will call you in ~10 minutes to discuss [OFFER]”.

> **Tip**
> Include an explicit end_call instruction—some voice agents won’t hang up on their own. If you pass dynamic variables, ensure they’re mapped; otherwise, the bot will speak placeholders.

▸ MODULE 10

Step 8 — 🧠 Add a knowledge base (Docs + Site maps)

Power answers from your client’s policies and website. Upload Google Docs (refunds, shipping, services) and ingest website sitemaps. Prefer managed assistants that auto-index,

or set up your own vector store when you need control.

Require answers with citations (doc title/URL, page/section, exact quote) and a fall-back to human escalation when uncertain.

PROMPT — E-COMMERCE POLICY SUPPORT

```
System: You're a customer support bot for [STORE NAME]. Use the latest Google Doc(s) named [DOC NAMES] and the website sitemap to answer exactly. If unsure, escalate to human with a short summary. Every answer must include a source citation with an exact quote. Never fabricate details.
```

Platform	What to do in this step
Make.com / n8n / Zapier	Fetch Docs via Google API. Chunk & embed (OpenAI/Gemini) to a vector DB or use a managed assistant API. On query, retrieve top chunks, then answer with citations.
Lindy	Attach knowledge sources and enforce citation style in the system prompt. Add escalation route when confidence is low.
ChatGPT (Custom GPTs)	Upload policy PDFs/Docs and set strict instructions about quoting and escalation. Great for operator-led chat and website widgets.
Retail AI	Attach the same knowledge; adapt to voice (short answers, confirm understanding). Provide transfer instructions if unsure.

Tip

Pinecone Assistants auto-handle indexing/embeddings; enable "include highlights" if you need exact quotes—default summaries may omit verbatim text.

▸ **MODULE 11**

Step 9 — 🔎 Build a daily research + newsletter assistant

Create a scheduled agent to find trends, competitor moves, or stock/industry updates and email the team. Use Apify for dynamic sites and Perplexity for web syntheses. Log finds to Sheets; email a digest via Gmail; optionally post a summary to Slack/Telegram.

PROMPT — TREND SCOUT FOR FOUNDERS

```
System: You are a trend research assistant for approachable small-business
ideas. Search the web for three trending, novel ideas with credible examples
launched recently. For each: one-sentence summary + 1 content angle to post
today. Return a clean numbered list.
```

PROMPT — COMPETITOR WATCH

```
System: Expert research agent. Input: [COMPETITOR NAME]. Use web search to
capture latest product updates, partnerships, hiring signals, and marketing
angles in the last 14 days. Summarize in bullets with links; end with 3
counter-moves.
```

PROMPT — NEWSLETTER PLANNER

```
System: You are a newsletter planning assistant. Given 3 input articles from
the past week, write a creative title and 4–6 topic bullets (punchy, no fluff).
Include a one-line CTA at the end.
```

PROMPT — PORTFOLIO REVIEW WITH SHEET LOOKUPS

```
System: Research the latest market news in the last 24 hours for stocks listed
in the Google Sheet [SHEET NAME]. Provide a concise buy/hold/sell note per
ticker with 1–2 reasons and a source link. If uncertain, recommend watchlist.
```

Send via Gmail with subject like “AI news update in the last 24 hours” and message content from your research node. Trigger daily on schedule.

> **Tip**
> n8n agents don’t have live web by default—configure HTTP calls to research APIs. Some Gemini tool-calls need thought signatures (errors may occur in current n8n nodes).

▸ MODULE 12

Step 10 — 💬 Add a Slack triage assistant

Route Slack messages to an agent that decides whether to reply via email, create a calendar event, or ask for more info. Log the decision and outcome in Sheets and reply in Slack.

PROMPT — SLACK TRIAGE PLANNER

```
System: You are a helpful assistant with two tools: Calendar and Gmail. For each Slack message: decide whether to email, schedule, or ask a clarifying question. Always reply with what you did and why in one or two sentences. Log {user, action, subject, time} to Sheets.
```

Platform	What to do in this step
Make.com / n8n	Slack event trigger → verify URL challenge → classify with AI → branch to Gmail or Calendar → append to Sheets → post Slack reply.
Zapier	New Slack Message → AI step (Formatter/Code + OpenAI) → Gmail/Calendar actions → Google Sheets row → Slack reply.
Lindy	Create an agent listening on Slack. Give Calendar/Gmail skills. Ensure logs to Google Sheets via webhook.

Platform	What to do in this step
ChatGPT (Custom GPTs)	Use for operator assist via Slack App only if you manage responses manually; automate with other builders.

REFERENCE

Slack Events API — Subscriptions and URL verification ↗

> **Tip**
> Slack subscriptions fail if your webhook doesn't echo the challenge. Use a Respond to Webhook node to return the challenge payload.

▸ MODULE 13

Step 11 — 🧩 Guardrails, structure, and variety

Enforce structured outputs with JSON schema (e.g., strengths, weaknesses, risk, reward, fit, justification). Add deterministic business rules (if shipping delayed → apology + ETA; if delivered → confirmation).

Introduce controlled variety: randomly send 25% of drafts back to AI for light formatting (bullets/subheads) to reduce sameness. In Make, mind the iterator/aggregator zone scope.

> **Tip**
> Template the bulk; let AI fill small parts. Over-long, fully AI-written documents are less predictable and harder to QA.

▸ MODULE 14

Step 12 — 🧪 Test end-to-end before launch

Dry-run each flow: new lead → message → Sheet log → booking; incoming Slack → route → log → reply; daily research → email. Test the whole pipeline and verify outputs and links.

For voice, test live and verify transfer/voicemail/end-call behavior. Confirm Sheets filtering works per contact.

If you scrape or use dynamic sites, validate the Apify actor run returns the expected dataset. Confirm webhook responses and retries work as intended.

> **Tip**
> Some n8n errors are transient. Refresh and re-run. If WhatsApp listening is used in dev, execute manually while inactive.

▸ MODULE 15

Step 13 — 🌐 Embed on sites and add intake

Embed your chat widget via a CDN snippet—works on WordPress, Webflow, Wix, Squarespace, or custom code. Add visible contact methods above the fold: phone, email, short contact form, live chat, social links, and address.

Add a simple intake form connected to your webhook and production URL. Log every submission to Sheets and notify Slack.

> **Tip**
> If cloning a site look with AI, expect ~40% first-pass fidelity. Iterate with concrete fix requests (spacing, border radius, gradients) to reach pixel-perfection.

▸ MODULE 16

Step 14 — 💼 Package and price clearly

Sell outcome-based packages with clear inclusions: AI receptionist + missed call text-back, lead follow-up and booking, customer reactivation, Google Business Profile help, site chat widget, and weekly reporting.

Offer deliverable-based retainers (weekly strategy, priority plans, daily availability, training, maintenance). Use ROI framing (missed-call recovery) and simple tiers.

Example tiers: $500/mo (site chat + basic automations), $1,500–$2,000/mo (lead gen + ads support), $2,500–$3,000/mo (full suite with Google Ads/SEO). One-time builds $300–$5,000 plus $2–$700/mo ongoing.

> **Tip**
> Avoid deep tech talk (meta tags, prompt minutiae). Show the inbox messages, calls, bookings, and reports—they sell themselves.

▸ MODULE 17

Step 15 — 🚀 Fill your pipeline (multi-channel)

Stack channels: Upwork (optimized profile; apply daily with a small custom asset + Loom), cold email via Instantly, niche communities and comment sections, and warm network intros. Use omni-channel follow-ups (email + LinkedIn DM + X message + Instagram DM).

Find businesses you already know, build a quick proof-of-concept without asking, then show the result. Add short personalized video outreach scrolling their site and explaining the fix.

OUTREACH — MISSED LEADS OPENER (DM/EMAIL)

```
Subject: [Personalized hook for [Name]]

Hey [NAME] — noticed you likely miss leads after hours. I build AI
receptionists that answer, qualify, and book automatically. I mocked up how it
would work for [BUSINESS]. Open to a 10-minute walk-through?
```

OUTREACH — AI EMPLOYEE TEASER

```
Subject: [Personalized hook for [Name]]

Hey [NAME], I built you an AI ‘employee’ that books appointments and follows up
24/7. If it looks useful, want to try it for a few days and see results?
```

NETWORK TEXT BLAST

```
Quick ask: who do you know that wants an AI-powered chief of staff to win back
10–15 hours/week and ship more projects? Happy to send a 60-sec demo.
```

> **Tip**
>
> Cold-to-retainer close rates are modest; win a one-time project first, then upsell to retainer. Track reply-rate benchmarks to iterate copy.

▸ MODULE 18

Step 16 — 🧭 Run discovery and close deals

Discovery SOP: build rapport; ask why your note stood out; quantify problems and costs; confirm urgency; share relevant experience; demo your solution; confirm next steps or proposal.

Restructure time: 70% on their problems/goals, 20% on solutions, 10% on objections/next steps. For proposals, keep business outcomes first, tech second.

PROMPT — QUICK PITCH DECK GENERATOR

```
Create 5–10 slides showing specific issues with [BUSINESS]'s online presence
and how AI automation (chat/voice receptionist, follow-up, reactivation) could
lift bookings by [X% example-only]. Each slide: pain, impact, proposed fix,
small metric to track.
```

> **Tip**
>
> Skip heavy legal paperwork early for small cross-border clients—paid pilots are stronger proof. Increase communication frequency to improve retention.

▸ MODULE 19

Step 17 — 🛬 Onboard clients smoothly

Use a short kickoff call: thank them, confirm cadence, timelines, support channels, account access (with 2FA), and data sources (Sheets/Docs/Drive). End with Q&A.

Collect form details: role/department, contacts, portfolio/links, availability, locations, experience, and one idea to improve the business. Mirror form fields in ClickUp for clear tracking.

Automate onboarding: push form responses to your CRM, send a welcome email, schedule first workshop via Cal.com, and generate any branded docs. For ClickUp-triggered tasks, have Make.com email candidates/clients with scheduling links.

> **Tip**
>
> Keep pipeline stages updated—forgetting to move back to Discovery after a proposal confuses teams and follow-ups.

▸ MODULE 20

Income Forecast

Track per-channel: open and reply rates, booked calls, CTRs, conversion rates, CPL/CPA, proposals sent/accepted, closed deals, engagement, traffic, and inbound leads. Keep a simple dashboard in Sheets.

Analyze aggregated comments and chats to see what's working, what users dislike, and what they want more of. A/B test subject lines and first lines; log variations and winners.

> **Tip**
> Reply rate guide (source-reported): <2% poor, 2–5% needs copy work, 5–10% solid, >10% excellent. Tighten targeting before rewriting from scratch.

▸ MODULE 21

Step 19 — 🧱 Scale with agentic fulfillment

Automate delivery: agentic workflows can handle proposals, onboarding, lead scraping/enrichment, campaign generation, and replies. Use plan mode first (ask questions), then enable auto-execution when stable.

Mix models by task (fast for drafts, reliable for user chats, reasoning for orchestration). Host n8n on Webspace Kit for low-cost throughput; import workflow templates to accelerate.

> **Tip**
> Define safe change boundaries: what to extract, what depends on it, and how services communicate. Add guardrail checks and choose pass/fail behaviors (e.g., Slack alert or stop workflow).

▸ MODULE 22

Step 20 — 🔒 Security and governance

Scope access minimally, especially with MCP-style tool bridges; prefer role-based permissions. Store secrets in your platform's credentials—not in plain text. Log decisions and keep audit trails.

If you must keep it simple during prototyping, document any hardcoded secrets and rotate them immediately post-demo.

> **Tip**
> Over-scoped access is the most common risk with protocol-based tool calling. Review permissions quarterly and on every new integration.

▸ MODULE 23

Mistakes to avoid

🧪

USING BASE, VAGUE MODELS

Picking a generic default (e.g., lowest-tier GPT-4) can reduce quality. Specify the exact model per task.

🔌

CONFUSING WHATSAPP CREDS

Triggers need client ID/secret; sending needs access token + business account ID—set both when applicable.

🧱

SCRAPING THE HARD WAY

LinkedIn and UGC sites block DIY scrapers. Use managed scrapers (e.g., Apify actors) to save time.

🐍

CUSTOM CODE TOO EARLY

Rolling Python servers means handling deploys, retries, and bugs. Ship no-code first, then extend.

🔐

OVER-SCOPED MCP ACCESS

Tool bridges without RBAC are risky. Limit scope and log calls.

▸ MODULE 24

Income Forecast

$500–$5,000/mo

Typical chatbot/automation retainer per client (source-reported/example-only)

$300–$5,000

One-time build/setup fee range (source-reported/example-only)

$2–$700/mo

Ongoing maintenance add-on per client (source-reported/example-only)

$500 / $1,500–$2,000 / $2,500–$3,000

Common tiered packages monthly (source-reported/example-only)

$1,000–$10,000

Three-week workshop revenue potential (source-reported/example-only)

$2,000

Four-week coaching implementation program (source-reported/example-only)

$25,000/mo

Five clients at $50k/yr each (annualized) (source-reported/example-only)

▸ MODULE 25

Resources

RESOURCES

- **Google OAuth credentials** — Create projects, enable Gmail/Sheets, OAuth setup
- **Google Sheets API — Append** — Append logs and metrics programmatically
- **Gmail API — Sending** — Send follow-ups and briefs
- **Slack Events API** — Subscribe to events and verify URL
- **Apify Docs** — Run actors for dynamic scraping
- **Pinecone Assistants** — Managed RAG with citations
- **Cal.com** — Create scheduling links for bookings

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THE JOBHACKI ARSENAL

What All-Access members get

All 7 JobHacki tools on one membership.

Hack your career.

AI Auto Apply

Swipe real jobs. We get each application ready; you check it and press submit.

Job Directory

Live jobs pulled straight from company hiring systems.

Resume Builder

A role-ready resume in minutes.

Resume Match

A 0-100 match score against live roles.

Interview Role Play

Free practice tests with an account; voice mock interview after the trial.

Playbook Directory

Step-by-step income and job playbooks.

Tool Directory

Tools, prompts, GitHub repos and GPTs, by category.

Create your free account

Get All-Access — see price and terms

See the community & what's inside

A free account opens the job hubs, playbook library, Tool Directory and Interview Role Play's practice tests.

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