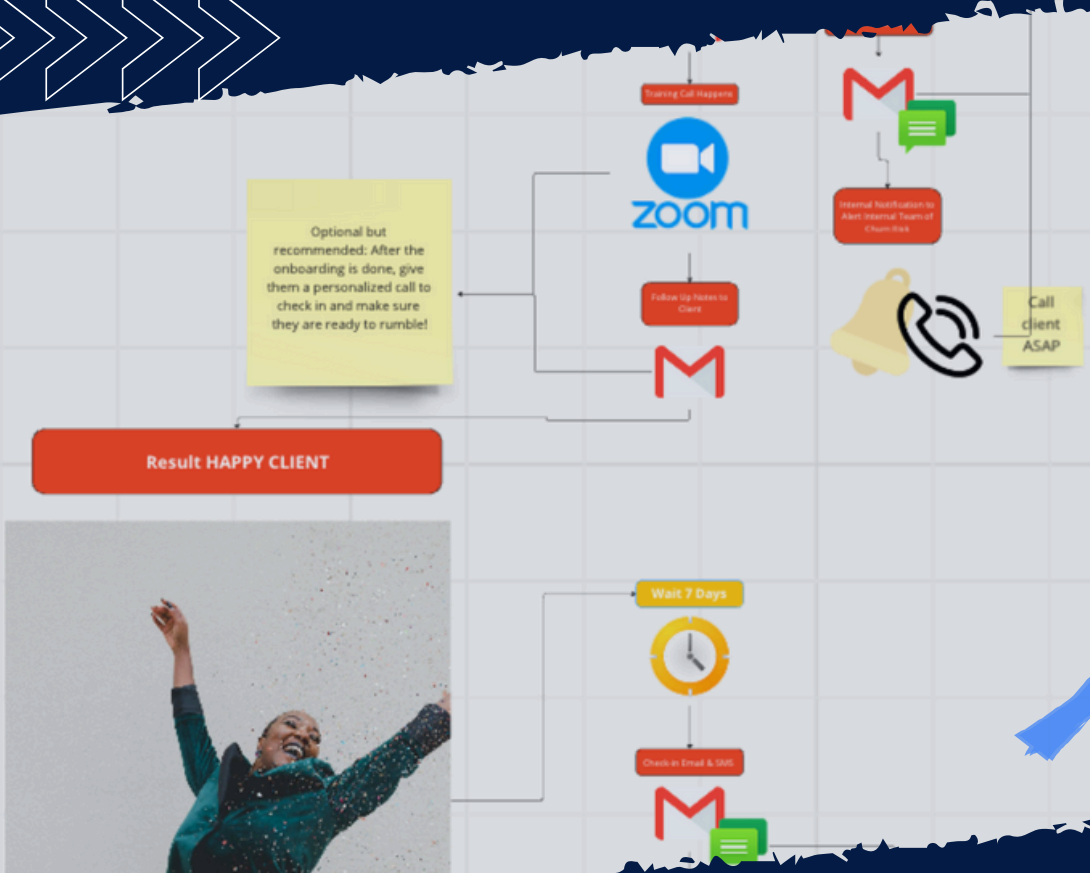
CHECKLISTS

TO SELL ONCE. KEEP GETTING PAID.



Extendly
For HighLevel

Welcome!

Inside this workbook, we are going to share the checklists to onboard and implement the Gorilla Glue AI: Offer.

1. AI Quick Wins funnel
2. Onboarding Checklist
3. Tech Setup Checklist
4. AI Employee Specific setup Checklists
    a. Conversational AI
    b. Review AI
    c. Voice AI
5. 5 quick wins for Implementation
6. Create a Support Flywheel

This playbook is designed to equip you with the strategies and insights needed to transform your customer retention efforts. Once you start implementing these techniques, you'll not only retain more customers but also turn them into super-fans! AKA, **people who'll advocate for your brand at every step.**

AI Quick Wins funnel

Click here to download the Snapshot

Customer Onboarding Journey

Onboarding Journey Overview:

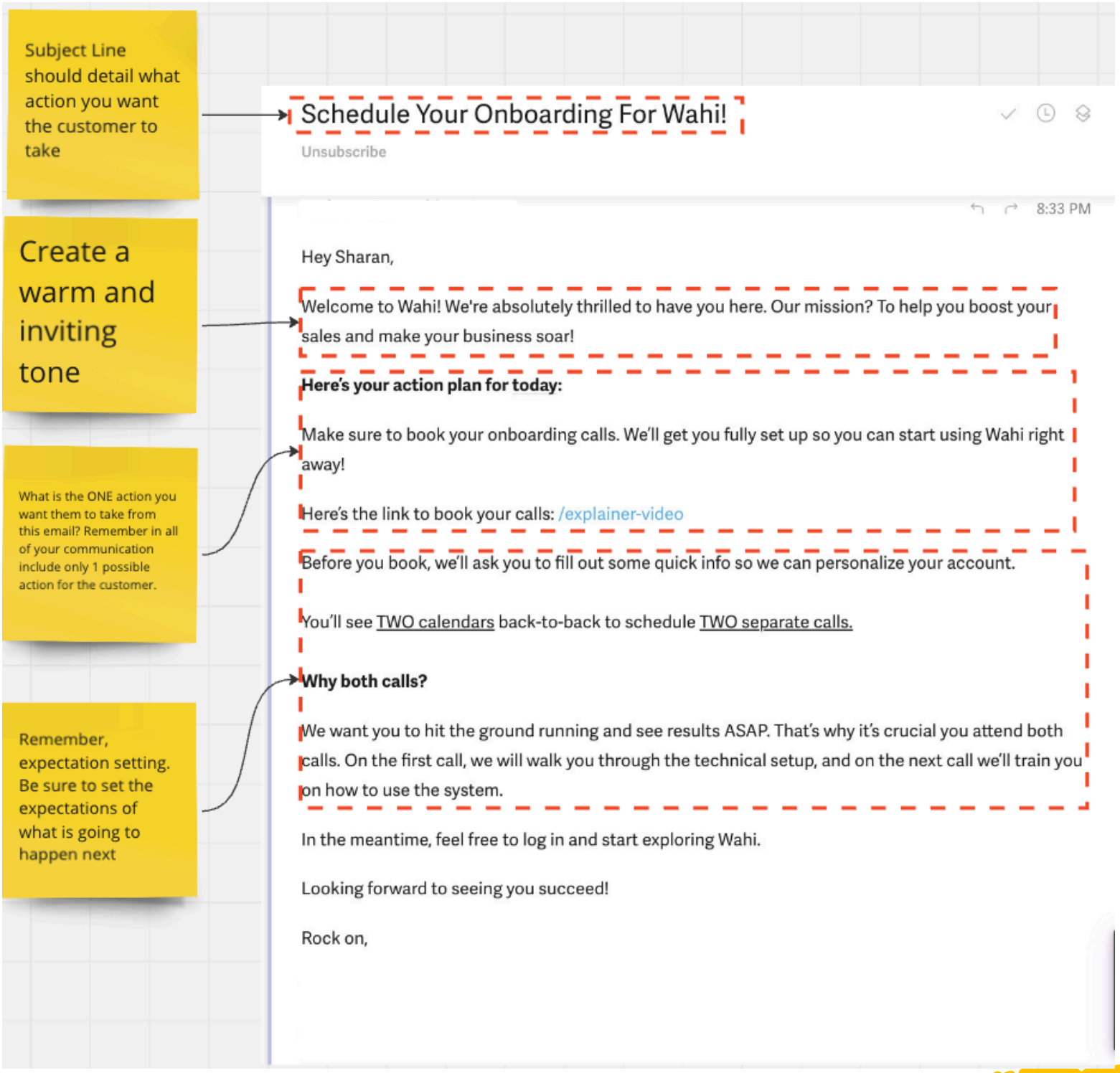
Immediate Post-Purchase:

- Immediate Post-Purchase Right after the purchase, hit them with a welcome email and SMS. This isn't just a thank you—it's the first step in managing their expectations. Clear, concise, and packed with value, these messages will guide them straight to our onboarding funnel. This is pivotal in setting the tone for what's to come.

Welcome Video and Expectation Setting:

- Now, here's where the fun begins! The first thing they'll see in the onboarding funnel is a welcome video. The point of this video is to get them excited and clarify what to expect next. Clear expectation setting post-checkout is critical to aligning perceptions with reality. Most importantly, a well done video will minimize any possible buyer's remorse and keep their excitement high.

Here's An Example of a Welcome Email



3. Intake Form & Booking in the Tech Call:

Next up, the intake form. Before their onboarding call, they'll fill out a few key details. This form gives us the intel to customize their sub-account in advance. This extra touch will create a tailored experience right from the start—this is how we show them they're in the right place. Right after the intake form is complete, the customer will see a calendar to book in, what we call, their “Tech Call”.

4. Reminders for Incomplete steps

If any steps are incomplete, such as the customer didn’t complete the intake form or didn’t schedule their tech call, we’ll send automated reminders to ensure that they don’t forget. It’s important that these steps are completed within 72 hours.

5. Reminders Leading up to the Call

We want to make sure that the time on the call is smooth and efficient. So again we will set up some expectations. In the reminder messages leading up to the call we prep the client on what they need to bring to be successful.

6. Technical Setup Call:

Here’s where we roll up our sleeves and get to work. The tech call is all about getting the essentials in place—domains, emails, integrations, you name it. Once this is all set up the client is ready to dive in. We’ve now eliminated potential technical hurdles and they can begin using their account immediately.

7. Training Call:

After the tech setup, it's time for the training call. This is where we get practical. We don't overwhelm them with features—they learn the daily-use functionalities that matter most to them. Tailored to their specific goals, this session builds their confidence and ensures they know how to get the most out of the platform.

8. Post-Call Support:

We don't stop at the call. Both the technical setup and training sessions are recorded and shared with clients, complete with follow-up notes. This way, they have a handy reference to revisit anytime, reinforcing their understanding and ensuring they stay on track.

9. Personalized Follow-Up [OPTIONAL]

And for the cherry on top—a personalized welcome call. This optional step shows your clients that you're not just a vendor; you're a partner invested in their success. It's a final touchpoint to address any lingering questions and solidify their confidence in you.

P.S. We mapped this entire journey on a miro map for you!

Tech Call/Setup Checklist

Implementation Checklist

- Essential Setup Items (for Any subaccount):
  - Create Subaccount (Manually or through SaaS Configurator)
  - Load Snapshot (Manually or through SaaS Configurator)
  - Completion of business profile information for A2P registration
  - Subdomain connection
  - Dedicated email domain creation
  - Social media and Calendar Integrations
  - Connection of calendar
  - Connection of meeting location
  - Time zone match
  - Calendar Availability set up
  - Create User
  - Password change
  - Purchase of phone number
  - Set up of phone number
  - A2P registration
- Complete the Custom Values (or use ExtendlyOS Forms)

- Configure the Voice AI Agent Settings
  - Time Zone
  - Agent Initial Greeting
  - Edit phone number in Transfer Actions
  - Connect Booking Appointment Calendar
  - Add Phone Number to Agent
  - Update Knowledgebase with Common 15 Q/A
  - Make Test call 1 (Test Q/A & appointment booking)
  - Make Test call 2 (Transfer action)
- Configure Conversational AI Agent (More details below)
  - Connect with Knowledgebase
  - Confirm action
  - Test bot
- Reviews AI Agent (More details below)
  - Enable Reviews AI (Auto Pilot)
  - Select Star Rating to respond
  - Connect GMB
  - Test manual response to review
- Connect Reviews to Social Planner
  - Create new post
  - Select Reviews
  - Select star rating 5, and post time 9 am 1 per day.
  - Select social channels (all available)
  - Schedule post

Conversation AI Setup Checklist

Conversation AI is a system that automates customer interactions using AI-powered bots to streamline communication across various channels.

How to Install and Configure Conversation AI

This document details the process from enabling the feature in your agency account to configuring your first bot in a client's sub-account.

Part 1: Enabling the Feature in Your Agency Account

The first steps must be taken from the Agency View of your HighLevel account. This is the main dashboard where you manage all your client sub-accounts.

- Step 1: Enable Conversation AI for Your Agency
  - Navigate to your Agency View.
  - Go to the ‘Company’ page or settings section.
  - Locate the option for AI Employee and enable it. This makes the feature available for use within your sub-accounts.

- Step 2: Choose Which Sub-Accounts Can Use Conversation AI
  - After enabling the feature at the agency level, you can control which specific client sub-accounts (also called "Locations") have access to it.
  - In your Agency View, navigate to Settings -> AI Employee.
  - From this screen, you can enable or disable the AI Employee feature for specific sub-accounts.

Part 2: Configuring Conversation AI in a Sub-Account

Once enabled at the agency level, you need to go into the specific Sub-Account to configure how it will respond to conversations.

- Step 1: Navigate to Conversation AI Settings
    - Log in to the HighLevel sub-account where you want to set up the bot.
    - In the left-hand navigation menu, click on Settings.
    - From the Settings menu, select Conversation AI to open the main dashboard.

- Step 2: Create Your First Bot
    - On the Conversation AI dashboard, click the “Create Agent” button. There you will be able to choose between two options: Create Prompt Based Bot or Guided Form Setup. Based on what you select the setup will vary.
    - You will be prompted to select a template. These templates provide foundational prompts that you can fully edit later.
        - General Q&A Template: Best for bots designed to handle customer support and general inquiries.
        - Appointment Booking Template: Tailored for bots intended to schedule and manage appointments.

- Step 3: Configure Basic Bot Settings
    - Set the Bot Status (Mode): This controls how the bot interacts with messages. The default status for a new bot is "OFF", where it is inactive but can still be trained and tested.
        - Suggestive: The bot generates response suggestions that appear inside the message composer box. This allows a user to review, edit, or send the AI's suggested reply manually. This mode is also available on the mobile app.
        - Auto-Pilot: The bot automatically responds to customer messages on its assigned channels without any manual intervention. This mode is also supported on the mobile app.
    - Assign Communication Channels: You must select the channels where your bot will be active.
        - In the bot's settings, find the "Supported Channels" dropdown and select from the available options: SMS, Facebook (FB), Instagram (IG), Web Chat (SMS Chat), and Live Chat.
        - Important: If a channel is not assigned to your bot, it will not be able to respond to messages on that platform. For example, to add the bot to your website's chat widget, you must add "Web Chat" as a supported channel.
    - Set the Bot as Primary: A Primary Bot is your main, default bot that handles all general inbound conversations that are not part of a specific workflow automation.
        - Select the bot you want to be the primary one and click the “Set as Primary” button, then click "Save".
        - You can only have one primary bot at a time.

- Step 4: Train Your Bot
    - Training helps make the bot's answers more accurate and relevant. This process is free of cost. There are two main ways to train your bot:
        - Web Crawler (URLs and Links): Add public website links (URLs), entire domains, or even Google Docs links. The bot will crawl these sources to gather information for its responses.
        - Custom Bot Responses (FAQs): Add specific Question and Answer pairs for frequently asked questions to ensure the bot gives precise, pre-configured answers.
- Step 5: Define Bot Goals (Prompts & Actions)
    - This step defines your bot's personality and primary objectives.
    - Configure the Prompt: The prompt guides the bot's core behavior and communication style.
        - Personality: Define the bot's tone (e.g., Friendly, Professional, Formal) to match your brand.
        - Intent: Specify the bot's main goal (e.g., Resolving Queries, Generating Leads, Appointment Booking).
        - Additional Information: Provide any other specific instructions to help the bot customize its responses.
    - Set Up Appointment Booking Actions: If your bot's goal is to book appointments, configure these automated actions.
        - Pick a Calendar: Select an existing calendar from your sub-account for the bot to book appointments on.
        - Send Booking Link: Have the bot send a direct booking link instead of showing available time slots.
        - Trigger Workflow After Booking: Automatically start a workflow (e.g., for sending confirmations) after an appointment is booked.

Note: You must create the workflow before you can connect it to the bot.

• Step 6: Adjust Advanced Settings
    ◦ These settings allow you to fine-tune the bot's interactive behavior for a more natural customer experience.
    ◦ Wait Time Before Responding: Set a delay before the bot replies to make the conversation feel more natural. A wait time of 5-20 seconds is recommended.
    ◦ Maximum Message Limit: Control how many messages the bot can send in a single interaction. The conversation can be reset by marking it as "read," which gives the bot 10 more messages to send. This can be automated using workflows.
    ◦ Send Bot to Sleep: Temporarily disable the bot if a live agent needs to take over the conversation, or during certain workflow actions.
• Step 7: Test Your Bot in Real-Time
    ◦ Before activating your bot, it's crucial to test it thoroughly. Testing is free.
    ◦ Go to the "Bot Trial" tab or use the chat window available in the "Training and Goals" sections.
    ◦ Chat with the bot to see how it responds to various queries.
    ◦ Give Feedback: Use the "Thumbs Up" and "Thumbs Down" buttons under each response. Thumbs down feedback automatically creates a new FAQ entry for you to correct, helping to train the bot.
    ◦ Edit Prompts on the Fly: You can edit the bot's prompts directly from the test window and then reset the conversation to see the changes immediately.

- Step 8: Go Live
    - Once you are satisfied with the bot's configuration and testing, you are ready to launch it.
    - Navigate back to the bot's settings.
    - Change the Bot Status from "OFF" to either "Suggestive" or "Auto-Pilot" to activate it on your selected channels.

Review AI Setup Checklist

Reviews AI: This feature is used to automatically or suggestively reply to customer reviews.

Part 1: Enabling the Feature in Your Agency Account

The first steps must be taken from the Agency View of your HighLevel account. This is the main dashboard where you manage all your client sub-accounts.

- Step 1: Enable Reviews AI for Your Agency
  - Navigate to your Agency View.
  - Go to the ‘Company’ page or settings section
  - Locate the option for AI Employee and enable it. This makes the feature available for use within your sub-accounts.

- Step 2: Choose Which Sub-Accounts Can Use Reviews AI
  - After enabling the feature at the agency level, you can control which specific client sub-accounts (also called "Locations") have access to it.
  - In your Agency View, navigate to Settings -> AI Employee.
  - From this screen, you can enable or disable the AI Employee feature for specific sub-accounts.

Part 2: Configuring Reviews AI in a Sub-Account

Once enabled at the agency level, you need to go into the specific Sub-Account to configure how it will respond to reviews.

• Step 3: Navigate to Reputation Management
  ◦ Log in to the specific sub-account where you want to set up the feature.
  ◦ Using the left-hand navigation menu, click on the 'Reputation' tab.

- Step 4: Choose Your Response Mode

  ◦ Inside the 'Reputation' section, click on the 'Settings' tab.
  ◦ Here, you will find options for Reviews AI. You can choose one of two modes
  ◦ Suggestive Mode: This mode acts as a co-pilot. It generates response suggestions for you to review, edit, and send manually. When you view a review, you can click the "AI Reply" button to generate a response. You can regenerate the response up to three times if you don't like the first one. Note that after an initial free trial period, each generated response is charged
  ◦ Auto Responses Mode: This mode fully automates your review responses. It will automatically send replies to new reviews based on rules you set, saving you time and ensuring no review is missed.

If you choose Auto Responses Mode, you can customize Wait Time Before Responding.

- This allows you to define a delay (e.g., 2 minutes) before the automated response is sent

- Step 5: Access and Create AI Agents
    - Navigate to Reputation -> Settings -> Reviews AI tab.
    - Click 'Create Agent'. You can either build one from scratch or use pre-built templates by selecting "Create Starter Agents".
    - When creating an agent, you can define its Name, Tone (e.g., Friendly, Professional), and a Prompt to guide its response style.

- Step 6: Configuring your Review AI Agent
    - Agent Name: Name attributed to your Review AI Agent, this will appear in the responses.
    - Agent Instructions: Set a prompt that will provide guidance on how you want your AI agent to respond to each review.
    - Agent Tone: Select a maximum of two pre-configured tones for your AI agent. This will influence the wording and tone used for every response.
    - Review Source: Tailor auto-responses for specific platforms like Google or Facebook
    - Review Type: Set rules to respond only to reviews with certain star ratings (e.g., only 5-star reviews)
    - Response Footer: Add a personal touch, like a "thank you" note or your business name, to the end of each automated reply.

Part 3: (Advanced) Setting Up Personalized AI Agents

For more brand consistency, you can create personalized AI "personalities" to handle review responses [2]. This is also done within the sub-account.

- Step 7: Assign and Configure Agents
  - Assign different agents based on review sentiment (Positive, Neutral, or Negative).
  - You can also assign specific agents to different Google Business Pages, which is useful for managing multiple locations or brands.
  - You can edit, clone, delete, and test your agents at any time to ensure their responses match your brand voice.

Part 4: (Optional) Setting Up Re-Billing for Your Clients

If you are an agency, you can re-sell this feature to your clients and add a markup for profit.

- Step 8: Enable Re-Billing for a Sub-Account
  - First, ensure Reviews AI is enabled for your agency.
  - In your Agency View, go to the 'Accounts' tab.
  - Find the sub-account and, if it isn't already, "Switch to SaaS" mode.
  - Click "View Details" for that sub-account and scroll to the "Reviews AI Re-Sell Settings" section.
  - Toggle the setting on, use the slider to set your markup, and click save. This will bill your client's account for their usage, and the payment will go to the Stripe account connected to your agency.

Voice AI Setup Checklist

Voice AI: This feature creates an AI-powered virtual receptionist that answers inbound calls, handles customer enquiries, books appointments, and captures leads using advanced speech recognition and automation.

Part 1: Enabling the Feature in Your Agency Account

The first steps must be taken from the Agency View of your HighLevel account. This is the main dashboard where you manage all your client sub-accounts.

Step 1: Enable Voice AI for Your Agency

- Navigate to your Agency View
- Go to the Company page or settings section
- Locate the option for AI Employee and enable it
- This makes the feature available for use within your sub-accounts

Step 2: Choose Which Sub-Accounts Can Use Voice AI

- After enabling the feature at the agency level, you can control which specific client sub-accounts (also called "Locations") have access to it
- In your Agency View, navigate to Settings → AI Employee
- From this screen, you can enable or disable the AI Employee feature for specific sub-accounts

Part 2: Creating and Configuring Voice AI in a Sub-Account
Once enabled at the agency level, you need to go into the specific Sub-Account to configure your Voice AI agent.

Step 3: Navigate to AI Agents Settings

- Log in to the HighLevel sub-account where you want to set up the feature
- Using the left-hand navigation menu, go to Settings → AI Agents
- From the AI Agents dashboard, click on the Voice AI option

Step 4: Create Your Voice AI Agent

- Click the blue + Create Agent button in the top right corner
- You'll be guided through a multi-step configuration process

Part 3: Agent Details Configuration
Step 5: Configure Agent Details Tab

- Agent Name: Enter a name for your agent (e.g., "Customer Support Assistant" or "Sarah - Virtual Receptionist")
- Business Name: Confirm or update your business name that the agent will represent
- Voice: Choose from a list of available AI voices (multiple accents and tones available). You can preview each voice by clicking the play button
- Agent Direction: Currently set to "Inbound" by default (outbound calling coming in future updates)
- Initial Greeting Message: Customize the first message your agent says
    - Example: "Hello! You've reached [Your Business Name]. How can I assist you today?"

Part 4: Agent Goals and Knowledge Base Setup

Step 6: Configure Agent Goals Tab. You have two options for setting up your agent's goals: Basic Mode or Advanced Mode

Basic Mode Setup:

- Select the information you want the agent to collect from callers:
  - Name
  - Email address
  - Phone number
  - Contact's issue or inquiry
- Basic mode simplifies setup with 4 pre-configured options
- No custom prompting required

Advanced Mode Setup:

- Prompt: Write detailed instructions and personality traits for your agent
- Call Transfer: Configure conditions to transfer calls to human agents
- Trigger a Workflow: Set up workflows to automatically initiate based on call interactions
- Update Contact Fields: Specify how collected information should update contact records
- Send SMS: Configure the agent to send SMS messages during or after calls

Step 7: Knowledge Base Integration

- Under "Select knowledge base," choose from existing knowledge bases or click "Create New"
- When to use this knowledge base: Define a trigger prompt that guides when to activate the knowledge base
    - Example: "Use this knowledge base if the user asks any questions about the business, services, products, contact details, or other relevant information that requires accessing the business wiki to provide accurate and up-to-date information."
- Assign knowledge bases that align with the agent's function (sales, support, product info)
- Changes to the knowledge base are reflected instantly in agent responses

Part 5: Workflow and Notification Setup

Step 8: Configure Post-Call Actions

- Trigger Workflows: Set up single or multiple workflows to trigger after call ends
- Email Notifications: Send detailed call summaries to team members including:
    - Call summary (duration, date, time)
    - Contact information collected
    - Full call transcript
    - Actions taken during the call

Part 6: Phone Number and Availability Configuration

Step 9: Phone and Availability Tab

- Assign Phone Number: Connect the AI agent to one or multiple phone numbers in your sub-account
- Call Handling Mode: Choose between:
  - Direct answering (agent answers immediately)
  - Voicemail-style (agent answers after ring timeout)
- Working Hours: Configure specific days and time intervals when the agent should handle calls
  - 24/7 operation available
  - Custom business hours supported
- Call Duration Limit: Set maximum call length (default 15 minutes, adjustable)
- Response Speed: Choose from Normal, Brisk, or Fast response times

Part 7: Testing and Going Live

Step 10: Test Your Voice AI Agent

- Use the built-in call widget to test agent responses before going live
- Make test calls from multiple devices to ensure quality
- Review call transcripts and audio recordings
- Test knowledge base integration with various questions
- Verify appointment booking functionality if configured
- Test call transfer scenarios

Step 11: Advanced Testing Scenarios

- Test edge cases: no-show calendars, invalid emails
- Test multi-turn conversations and clarifications
- Verify workflow triggers work correctly
- Ensure SMS notifications send properly
- Test knowledge base accuracy with business-specific questions

Step 12: Launch and Monitor

- Once testing is complete, your Voice AI agent is ready for live calls
- Monitor initial calls closely and adjust prompts as needed
- Review call analytics and performance metrics
- Update knowledge base content based on common questions
- Refine trigger prompts based on real user interactions

Part 8: Pricing and Billing Setup (Optional for Agencies)

Step 13: Configure Re-billing for Clients

- Voice AI pricing options:
  - Pay-as-you-go: $0.13 per minute
  - Unlimited plan: $97/month (includes all AI Employee features)
- Additional costs: $1.15/month per phone number + $0.0085 per inbound call minute
- Set up custom re-billing rates in Agency View → Reselling → AI Employee Reselling

Configure markup pricing for client billing

Important Notes

- Voice AI only works with LC Phone System (LeadConnector numbers), not direct Twilio integration
- Knowledge base updates are reflected instantly in agent responses
- Multiple agents can share the same knowledge base or have dedicated ones
- All call interactions are recorded and transcribed for quality monitoring
- Advanced features like outbound calling are planned for future releases

5 Quick Wins

Quick Wins Within 72 Hours

The first 72 hours are crucial. This is your chance to show immediate value and build rock-solid customer confidence. Here are the five core things your clients should see happen in the first 72 hours during training and afterwards.

1. Voice AI

Make sure they listen to a call, either live or a test. They should feel fully confident the AI is customized to their business needs, and is hitting the objectives set.

2. Conversation AI

Next, make sure they can see SMS messages coming in and getting responded to appropriately. Demonstrate the system booking an appointment, fielding a support question, etc. Show them how to edit the relevant field/custom values using ExtendlyOS forms.

3. Review AI

Now, onto reviews and Google My Business (GMB). Write a review for them, and demonstrate the AI responding with the right tone that represents their brand. If possible show them this in real time.

4. Conversation Manager and Calendar
Make sure they understand how to respond to messages, pickup from AI, and book and appointment. They should see the simplicity of this feature, and how their team can leverage to save time and stay organized.

5. Mobile App

Finally, the mobile app. Give them the power to manage their business on the go. Whether they're at the office, at home, or on vacation, they'll have everything they need right in their pocket. The convenience of having their entire business accessible from a mobile app will keep them engaged and loyal.

The purpose of setting up these quick wins is to show immediate value and build customer confidence

The goal here is simple - show immediate value. When your customers see these quick wins within the first 72 hours, they'll be hooked. They'll feel the impact of your services right away, and their confidence in your business increases by A LOT! This sets the stage for a long-term, profitable relationship where they're not just customers but SUPER FANS!

PRO TIP!

Follow-Up: Don't just set it and forget it. Check in with your customers to ensure they are on track and offer assistance if needed. Show them you're there to support their success.

Create a Support Flywheel

The Needs of 24/7 On-Demand Support

Alright, let's dive into one of the most critical aspects of keeping your customers thrilled and loyal: 24/7 on-demand support. When your customers know they can get help anytime, anywhere, it's a huge confidence booster.

Purpose: Ensure Customers Feel Supported at All Times
Think about it. Your customers need to know you've got their back, no matter what time it is. Whether it's 2 PM or 2 AM, they need to feel supported. This is all about creating a safety net for them, ensuring they never feel alone when they are frustrated.

Benefits of 24/7 Support

Availability: Your customers can get help whenever they need it, reducing frustration and downtime. Imagine the relief they'll feel knowing they can reach out at any time and get the assistance they need. It's a huge win for their peace of mind.
Trust: Consistent, reliable support builds trust. When customers know they can count on you to be there when they need it, their trust in your service increases. Trust is the foundation of customer loyalty, and 24/7 support is one of the best ways to build it.

Implementation Tips

Send nurture emails:
Use this snapshot for a template for promoting adoption. Go in to the workflow and edit the 4 email sequence to match your offer and how you support your clients.

Multiple Channels: Offer support through various channels—chat, email, Zoom, and a comprehensive knowledge base. Different customers prefer different methods of communication, so give them options. Make it as easy as possible for them to get in touch.

Response Time: Aim for rapid response times, especially for urgent queries. Your goal should be to respond within minutes, not hours. Quick responses show your customers that you value their time and are dedicated to resolving their issues swiftly.

BONUS: Your Personal AI Executive Coach

Get *unlimited* access to Deeper.Coach
Your AI executive coach trained on thousands of successful HighLevel agencies.

What It Does:
Daily check-ins to keep you accountable
Strategic guidance based on what actually works
Personalized coaching for agency growth & scale
Built by Extendly, trained on real agency success patterns

Recommended: Start with a daily check-in and do this each day for maximum success.

This AI coach knows what works because it's learned from agencies just like yours that have already scaled successfully.

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