Edit

New Member Progress Tracker™

A.I. AGENCY INSIDERS

Your Roadmap From New Member → First/Next Paying Client

Welcome to your **New Member Progress Tracker™**.

This is not designed to measure how many videos you watch.

It is designed to measure something much more important:

PROGRESS TOWARD REVENUE.

Inside A.I. Agency Insiders, your goal is not to “complete the course.”

Your goal is to move through four stages:

BUILD → ACQUIRE → DELIVER → IMPROVE

Use this tracker to see exactly where you are, what you have completed, and what you should do next.

YOUR PRIMARY MILESTONE

🎯 FIRST/NEXT PAYING CLIENT

Everything in your first phase of A.I. Agency Insiders should move you toward one outcome:

> Choose a market.
> Identify an expensive problem.
> Package a simple offer.
> Start conversations.
> Sign a paying client.

You do not need to master every tool, service, workflow, or A.I. platform before you begin.

STAGE 0 — START HERE

Goal:

Get fully onboarded and understand how A.I. Agency Insiders works.

☐ 1. Watch the Welcome to A.I. Agency Insiders Video

You should understand:

- What A.I. Agency Insiders is
- The BUILD → ACQUIRE → DELIVER → IMPROVE framework
- What your first objective is
- Why you should not try to learn everything before taking action

Status:
☐ Not Started
☐ In Progress
☐ Complete

☐ 2. Review the A.I. Agency Insiders Membership Map™

You should be able to identify:

- Where BUILD resources are located
- Where ACQUIRE resources are located
- Where DELIVER resources are located
- Where IMPROVE resources are located
- Where to go when you need help

Status:
☐ Not Started
☐ Complete

☐ 3. Complete Your New Member Setup Profile

Make sure your member profile includes your:

- Name
- Agency/business name
- Current business stage
- Existing client count
- Current services
- Target market, if known
- Primary business objective
- HighLevel status

Status:
☐ Not Started
☐ Submitted

☐ 4. Complete the "Choose Your Starting Point" Assessment

Your assessment should identify whether your best starting path is:

☐ Starting From Scratch

☐ Existing Agency / Consultant

☐ Already Have Clients

☐ Adding A.I. Services

☐ Improving Fulfillment

My Recommended Starting Path:

☐ 5. Activate Your HighLevel Access

Confirm that you have:

☐ Submitted your HighLevel activation request

☐ Received your login/access

☐ Successfully logged in

☐ Located your Contacts area

☐ Located Conversations

☐ Located Opportunities/Pipelines

☐ Located Calendars

☐ Located Automations/Workflows

You do not need to become a HighLevel expert.

You simply need to understand where the core pieces of your agency operating system live.

☐ 6. Join the Private A.I. Agency Insiders Community

After joining:

☐ Complete your profile

☐ Introduce yourself

☐ Share the market you are considering

☐ Share the service or problem you are considering solving

☐ Locate the support/help area

☐ 7. Review How Client Fulfillment Works

You should understand this basic process:

SELL

↓

REPORT / SUBMIT CLIENT

↓

CLIENT ONBOARDING

↓

HIGHLEVEL / SYSTEM SETUP

↓

FULFILLMENT

↓

MEMBER REVIEW

↓

CLIENT LAUNCH

↓

ONGOING MANAGEMENT

Status:
☐ Reviewed
☐ I Understand the Process

☐ 8. Review the Membership Rules & Fair Use Guide

Confirm that you understand:

☐ Active membership requirements

☐ Client sub-account rules

☐ White-label fulfillment guidelines

☐ Fair use requirements

☐ Pass-through HighLevel costs

☐ Client Launch Rate requirements

☐ Cancellation/sub-account policies

START HERE COMPLETION

You are ready to move forward when:

☐ My membership access is working

☐ My HighLevel access is working

☐ I understand how fulfillment works

☐ I know where to get support

☐ I know my recommended starting path

START HERE STATUS:

☐ NOT STARTED

☐ IN PROGRESS

☐ COMPLETE

STAGE 1 — BUILD

Goal:

Create one simple service offer that solves a real business problem.

Do not try to create your entire agency at once.

Your goal is:

ONE MARKET + ONE PROBLEM + ONE OFFER

☐ 9. Choose Your Target Market

Use the Profitable Niche Selection System™ and/or A.I. Agency Growth OS™.

My Target Market:

Examples:

- HVAC
- Plumbing
- Roofing
- Dentists
- Chiropractors
- Med spas
- Attorneys
- Contractors
- Auto repair
- Local service businesses

Why I Chose This Market:

☐ 10. Identify the Expensive Problem You Will Solve

Select a problem businesses already care about.

Possible problems include:

☐ Missed incoming leads

☐ Slow lead follow-up

☐ Not enough Google reviews

☐ Unanswered website inquiries

☐ Missed phone calls

☐ Appointment no-shows

☐ Old leads sitting unused

☐ Poor customer follow-up

☐ Lost repeat business

☐ Other: ______________________________

My Chosen Problem:

☐ 11. Select Your Primary Offer

Choose one offer to lead with.

Possible examples:

☐ Missed-Lead Recovery System™

☐ Review Growth System™

☐ A.I. Website Receptionist™

☐ A.I. Voice Receptionist™

☐ Lead Follow-Up System

☐ Customer Reactivation System

☐ Other: ______________________________

My Primary Offer:

☐ 12. Define the Outcome

Complete this sentence:

> "We help ____________________________ businesses ____________________________ without ____________________________."

Example:

> "We help HVAC companies recover missed leads automatically without requiring someone to manually follow up with every inquiry."

My Core Outcome Statement:

☐ 13. Package Your Offer

Define what the client receives.

Offer Name:

What Is Included:

1.
2.
3.
4.
5.

☐ 14. Set Your Pricing

Setup Fee:

$_________________

Monthly Fee:

$_________________ / month

Optional Upsells:

☐ 15. Prepare Your Basic Sales Explanation

You should be able to explain your offer in approximately 30 seconds.

Complete:

> “We help [TYPE OF BUSINESS] solve [PROBLEM] by installing [SOLUTION], which helps them [BUSINESS RESULT].”

My 30-Second Explanation:

BUILD MILESTONE

You have completed BUILD when you can clearly answer:

Who do I help?

What expensive problem do I solve?

What do I sell?

What do I charge?

BUILD STATUS:

☐ NOT STARTED

☐ IN PROGRESS

☐ OFFER READY

STAGE 2 — ACQUIRE

Goal:

Start real conversations with businesses.

Do not wait for everything to be perfect.

CONVERSATIONS CREATE CLIENTS.

☐ 16. Choose Your Primary Client Acquisition Method

Choose ONE primary method first.

☐ Warm Outreach

☐ Cold Email

☐ Cold Calling

☐ Facebook / Instagram DM

☐ LinkedIn Outreach

☐ Local Networking

☐ Referral Partners

☐ Local Business Audits

☐ Video/Loom Audits

☐ Organic Social

☐ Paid Advertising

My Primary Method:

☐ 17. Build Your First Prospect List

First Goal:

25–50 PROSPECTS

Track:

Prospect #1:

Prospect #2:

Prospect #3:

Prospect #4:

Prospect #5:

Use your CRM/prospecting system for the complete list.

Number of Prospects Identified:

☐ 18. Prepare Your Outreach Message

Your outreach should:

- Be short
- Be relevant
- Focus on their problem
- Avoid A.I. jargon
- Avoid trying to sell everything
- Create curiosity

- Start a conversation

My Primary Outreach Script Is Ready:

☐ Yes

☐ 19. Send Your First Outreach

ACTION MILESTONE

Date First Outreach Sent:

Number Sent:

This is an important milestone.

You have moved from preparation into actual client acquisition.

☐ 20. Complete Your First 25 Outreach Attempts

Track progress:

☐ 5 completed

☐ 10 completed

☐ 15 completed

☐ 20 completed

☐ 25 completed

☐ 21. Get Your First Positive Response

Prospect:

Date:

Next Step:

☐ Send more information

☐ Conduct audit

☐ Book call

☐ Send demo

☐ Follow up

☐ 22. Conduct Your First Sales Conversation

Prospect:

Date:

Outcome:

☐ Follow-up required

☐ Proposal requested

☐ Demo requested

☐ Not interested

☐ Closed

☐ 23. Send Your First Proposal / Offer

Prospect:

Offer:

Investment:

$________________ setup

$________________ / month

Date Sent:

ACQUISITION SCORECARD

Prospects Identified:

Outreach Attempts:

Responses:

Conversations:

Sales Calls:

Proposals:

Clients Closed:

STAGE 3 — FIRST/NEXT CLIENT MILESTONE

🏆 I SIGNED A PAYING CLIENT

Client Name:

Date Closed:

Service Sold:

Setup Fee:

$________________

Monthly Recurring Revenue:

$________________ / month

☐ 24. Report Your Client Milestone

Complete the Client Launch Milestone Reporting Form if required.

☐ Submitted

Date:

☐ 25. Request/Create the Client HighLevel Sub-Account

☐ Requested

☐ Created

☐ Access confirmed

☐ 26. Send the Client Through C.A.R.E. Onboarding

☐ C.A.R.E. intake sent

☐ Client completed intake

☐ Required assets received

☐ Required access received

☐ 27. Select the Appropriate Client Service Engine

Engine / Fulfillment System:

☐ 28. Submit Fulfillment Request

☐ Submitted

Date:

Requested Service:

☐ 29. Review and Approve Fulfillment

☐ System reviewed

☐ Testing completed

☐ Revisions submitted if needed

☐ Approved for client launch

☐ 30. Launch the Client

🚀 CLIENT LIVE

Launch Date:

System/Service Launched:

STAGE 4 — DELIVER & RETAIN

Goal:

Turn the first sale into recurring revenue and a strong client relationship.

☐ 31. Confirm the Client's System Is Working

Check:

☐ Leads are flowing correctly

☐ Notifications are working

☐ Automations are firing

☐ Phone/SMS/email connections work

☐ Client understands the system

☐ 32. Establish Client Communication Expectations

Define:

- Where they contact you
- When you provide updates
- What you report
- What is included
- What requires a new request
- What is outside scope

☐ Complete

☐ 33. Schedule the First Client Review

Review Date:

Review:

- Usage
- Results
- Problems
- Opportunities
- Additional services

☐ 34. Identify the Next Upsell Opportunity

Potential next service:

☐ Review Growth

☐ Lead Recovery

☐ Voice A.I.

☐ Website Receptionist

☐ Reactivation

☐ Additional automation

☐ Other: ______________________________

Potential Monthly Revenue Increase:

$_________________ / month

STAGE 5 — IMPROVE

Goal:

Use what you learned from the first client to make the next client easier.

☐ 35. Review What Worked

What helped me get the client?

☐ 36. Identify What Slowed You Down

☐ 37. Improve Your Offer

What should change?

☐ Positioning

☐ Pricing

☐ Deliverables

☐ Sales explanation

☐ Outreach

☐ Proposal

☐ Target market

☐ Nothing yet

Notes:

☐ 38. Create Your Next Prospect List

Next Target:

50 PROSPECTS

☐ Started

☐ 39. Continue Your Weekly Client Acquisition Rhythm™

Track each week:

Activity	Weekly Target	Actual
New Prospects	______	______
Outreach Attempts	______	______
Follow-Ups	______	______
Sales Conversations	______	______
Proposals	______	______
New Clients	______	______

YOUR REVENUE SCORECARD

Paying Clients:

Monthly Recurring Revenue:

$________________

Setup Revenue This Month:

$________________

Total Monthly Agency Revenue:

$________________

NEXT REVENUE MILESTONES

☐ First Paying Client

☐ $500 MRR

☐ $1,000 MRR

☐ $2,500 MRR

☐ $5,000 MRR

☐ $10,000 MRR

☐ $25,000 MRR

☐ $50,000+ MRR

YOUR CURRENT POSITION

Mark ONE:

☐ I'm getting set up.

☐ I'm choosing my market.

☐ I'm building my offer.

☐ I'm building my prospect list.

☐ I'm doing outreach.

☐ I'm getting responses.

☐ I'm having sales conversations.

☐ I'm sending proposals.

☐ I signed my first/next client.

☐ My client is onboarding.

☐ My client is in fulfillment.

☐ My client is live.

☐ I'm working on client #2.

☐ I'm scaling recurring revenue.

IF YOU FEEL STUCK…

Do not go searching through every resource inside the membership.

Identify the specific milestone you are stuck on.

“I don't know who to target.”

→ Go to **Profitable Niche Selection System™**

“I don't know what to sell.”

→ Go to **Easy Yes Offer Templates™**

“I don't know what to charge.”

→ Go to **Service Packaging & Pricing Guide™**

“I don't know who to contact.”

→ Go to **Client Acquisition Playbooks™**

“I don't know what to say.”

→ Go to **Outreach Script Vault™**

“I don't know how to close them.”

→ Go to **Sales Call Framework + Proposal Templates™**

“I'm worried about fulfillment.”

→ Go to **White Label Fulfillment Center™**

“I signed a client.”

→ Go immediately to the **First Client Journey Map™**

THE RULE TO REMEMBER

DON'T MEASURE LEARNING.

MEASURE MOVEMENT.

Watching another video is not necessarily progress.

Creating another logo is not necessarily progress.

Changing niches again is not necessarily progress.

Buying another A.I. tool is not necessarily progress.

Progress looks like:

Market Selected

↓

Problem Selected

↓

Offer Created

↓

Prospects Identified

↓

Outreach Sent

↓

Conversation Started

↓

Proposal Sent

↓

Client Closed

↓

Client Launched

↓

Recurring Revenue

YOUR NEXT ACTION

Before leaving this page, complete this sentence:

The single most important thing I need to do next is:

I will complete it by:

A.I. AGENCY INSIDERS

BUILD → ACQUIRE → DELIVER → IMPROVE

One Market.

One Problem.

One Offer.

One Client.

Then do it again.

How I would implement this asset

I would create **three versions from this one master asset**:

1. **Interactive portal tracker** — the main version, with clickable checkboxes and milestone status.
2. **Printable/downloadable PDF** — for members who want a physical worksheet.
3. **HighLevel-powered progress tracker** — where key milestones are stored on the member's contact record and can trigger automations.

For the HighLevel version, I would track at minimum these milestone fields:

Onboarding Complete → Market Selected → Offer Selected → First Prospect List → First Outreach → First Positive Response → First Sales Call → First Proposal → First

Client → C.A.R.E. Complete → Fulfillment Submitted → Client Live → Client #2.

That gives you something even more valuable than a member checklist: it gives **you visibility into exactly where every member is getting stuck**, so you can automatically send the right help at the right moment.