



⚡ Grounded in 12+ creator sources

AI Automation Agency: The Real Playbook

A step-by-step, evidence-backed guide to launching and scaling an AI automation agency—using real frameworks, pricing, and client-getting tactics from creators earning \$72K/month. No fluff, just what actually works.

📌 Updated for 2026

📄 **\$300–\$500/mo/client (source-reported)** Recurring revenue per small business client

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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

- ✓ Who This Guide Is For
- ✓ Problem This Business Solves
- ✓ The Offer That Actually Sells
- ✓ Business Snapshot
- ✓ Who Pays For It
- ✓ Startup Cost — Real Breakdown

Who This Guide Is For

This guide is for solo operators, freelancers, and small teams who want to build a recurring-revenue business by installing AI-powered automations for local businesses. If you want to skip the generic 'agency' grind and use proven, productized systems (AI receptionists, review automation, lead follow-up) that real creators use to land \$300–\$500/mo clients, this is for you.

▶ **MODULE 02**

Business Snapshot

**\$300–
\$500/mo/client**

Typical recurring fee (source: Adam Earhart, SixFlow, Nick Sarv)

\$0–\$200

Startup cost (using n8n, Vapi, or HighLevel free trials; Twilio pay-as-you-go)

1–2 weeks

Time to first client (reported by multiple creators)

\$72,000/mo

Example top-line revenue (Nick Sarv, scaled agency)

No coding required

Most systems are built with drag-and-drop tools (n8n, HighLevel, Retell AI)

▶ **MODULE 03**

Problem This Business Solves

Most local businesses lose leads and revenue because they miss calls, forget to follow up, or fail to collect reviews. 78% of customers buy from the first business to respond (Lead Connect). AI automation agencies close this gap by installing systems that answer calls, follow up with leads, and request reviews automatically—turning lost opportunities into booked appointments and higher Google rankings.

▶ **MODULE 04**

Who Pays For It

Small business owners in service industries: plumbers, dentists, auto repair, salons, HVAC, landscapers, and more. These owners pay \$300–\$500/month for systems that help them capture more leads, never miss a call, and boost their Google reviews. They care about results, not tech jargon.

▶ **MODULE 05**

The Offer That Actually Sells

The winning offer is a productized system, not custom hourly work. Example: 'AI Receptionist + Automated Review Requests + Lead Follow-Up, installed and managed for \$300/month.' Give away the website or setup for free (or cheap), then charge monthly for the automation system behind it. This is called the 'revenue website' model (Adam Earhart)—the site is free, the system is \$300/mo.

▶ **MODULE 06**

Startup Cost — Real Breakdown

Item	Cost	Notes
n8n, Vapi, or HighLevel trial	\$0–\$97	Free trials available; HighLevel is \$97/mo after trial
Twilio phone number	\$1– \$2/mo	Pay-as-you-go for calls/SMS
Domain/website	\$10–\$20	Optional; can use Notion or Carrd for landing page
VA for template site swap	\$50	Optional; for fast delivery (Adam Earhart)
Appify credits (for scraping, optional)	\$10–\$50	Only for advanced lead gen

▶ MODULE 07

Skill Requirements

Skill	Level	How to Learn
n8n/HighLevel/Retell AI setup	Beginner	YouTube tutorials (see sources)
Twilio/SMS integration	Beginner	Follow setup guides (Retell AI, HighLevel)
Client onboarding	Beginner	Use provided kickoff call SOP (Nick Sarv)
Basic troubleshooting	Beginner	Community forums, Skool groups
Copy/paste outreach	None	Script provided below

Step-by-Step Launch Plan

- 1 Pick a niche you understand (e.g. auto repair, salons, dentists).
- 2 Set up a demo system using n8n, HighLevel, or Retell AI (free trial).
- 3 Use a template site or landing page (Carrd, Notion, or HighLevel).
- 4 Connect Twilio for SMS/calls (pay-as-you-go).
- 5 Install a simple automation: AI receptionist, review request, or lead follow-up.
- 6 Test the system with your own phone and a friend's number.
- 7 Reach out to your warm network (friends, family, local business owners).
- 8 Offer to install the system for free or at a discount in exchange for a testimonial.
- 9 Document the results (screenshots, testimonials).
- 10 Use these as proof to pitch new clients at full price.

First 7 Days

- 1 Day 1: Pick your niche and research 10 local businesses with low Google reviews.
- 2 Day 2: Set up your demo system (use HighLevel or n8n trial).
- 3 Day 3: Connect Twilio and test inbound/outbound calls.
- 4 Day 4: Build a template landing page (Carrd/Notion).
- 5 Day 5: Reach out to 10 people in your warm network using the script below.

- 6 Day 6: Run a live demo for any interested business owner.
- 7 Day 7: Close your first client (even at a discount or for a testimonial).


▶ **MODULE 10**

First 30 Days

- 1 Install your system for 1–3 clients (even if free/testimonial).
- 2 Collect before/after screenshots and testimonials.
- 3 Refine your onboarding process using Nick Sarv's kickoff call SOP.
- 4 Post your results and learnings on LinkedIn, Facebook, or local groups.
- 5 Reach out to 5–10 new businesses per week (Google Maps, referrals).
- 6 Start charging full price (\$300–\$500/mo) for new clients.
- 7 Document every objection and question—use these to improve your pitch.
- 8 Build a simple agency website that answers the 5 key questions (see below).

▶ **MODULE 11**

Insider Secrets & Shortcuts

- 1 Use HighLevel's workflow templates to set up review automation in under 20 minutes per client (Adam Earhart).
- 2 For AI voice agents, always set 'voicemail detection' ON and 'hang up if voicemail is reached' in Retell AI to avoid wasting call credits (Retell AI tutorial).
- 3 Personalize cold emails at scale by scraping websites with Apify and generating multi-line icebreakers—this got Nick Sarv 5–10% reply rates and \$72K/mo (Nick Sarv). 

- 4 Never host n8n for clients on your own server unless you have a commercial license—always build in their environment for compliance (How to Actually Deliver AI Projects).

- 5 The 'revenue website' model: give away the site, charge for the system behind it. Use the same template for every client, swap logo/name/services, and deliver in under an hour (Adam Earhart).

- 6 Start with your warm network and ask for referrals using a non-salesy script—this is how most creators landed their first 1–3 clients (Get Your First Agency Clients as a Beginner).

▶ **MODULE 12**

How To Find Your First Customers

Start with your warm network: friends, family, past coworkers, and any business you visit regularly. Next, search Google Maps for local service businesses with low review counts or outdated reviews. Reach out directly via phone, email, or in person. For cold outreach, scrape leads using Apollo + Apify, then send personalized emails (see Nick Sarv's method).

▶ **MODULE 13**

Copy/Paste Outreach Script

▶ **MODULE 14**

Pricing Model

Service	Setup Fee	Monthly Fee	Notes
AI Receptionist + Review Automation	Free– \$199	\$300– \$500	Most creators waive setup to close deals
Website Template	Free	Bundled	Swap logo/name, deliver in 1 hour
Advanced Lead Gen (cold email system)	\$250– \$500	\$500+	For agencies targeting other agencies

▶ MODULE 15

Upsell Ideas

- 1 Add Google Ads or Facebook Ads management for \$300–\$1,000/mo extra.
- 2 Offer dashboard/reporting automation (Make.com, n8n) for \$200–\$500/mo.
- 3 Install AI chat widgets on client websites for \$100–\$200/mo.
- 4 Sell advanced lead scraping and cold email campaigns (using Apify + Instantly).

▶ MODULE 16

Risks / Legal / Compliance

Compliance Red Flags

If you host n8n for clients, you must have a commercial license—otherwise, always build in the client's environment (see 'How to Actually Deliver AI Projects'). Never store client API keys or credentials in plain text. For SMS/call automations, ensure you comply with local telemarketing and privacy laws. Always use HTTPS for webhooks and authenticate all external triggers.

► MODULE 17

Source Notes

"I scaled my own AI and automation agency to \$72,000 per month. This is the sort of thing that routinely gets me 5 to 10% reply rates on my cold email campaigns."

— Nick Sarv, I Deep-Personalized 1000+ Cold Emails Using THIS AI System

[1] AI Voice Agent Outbound Calls + SMS System (Full Tutorial) | Retell AI + n8n + Google Sheets

[2] Mastering the Call Transfer Node in Retell AI | Complete Guide for Beginners

[3] I Deep-Personalized 1000+ Cold Emails Using THIS AI System (FREE TEMPLATE)

[4] How I Sign Local Business Clients With ONE Simple System (No Custom Work)

[5] Get Your First Agency Clients as a Beginner (Zero Cold Calling, Zero Ads)

[6] How to Actually Deliver AI Projects (APIs, Hosting & Handover Explained)

[7] How to Sign Your First AI Automation Client (Without Starting an Agency)

[8] How I Sell AI Receptionists to Local Businesses (Step-by-Step Breakdown)

[9] How To Service Your First AI Automation Agency Client In 2024 (Make.com)

[10] How to Get Your First \$297/Month Client This Week (No Experience Needed)



Resources, Certifications & Direct Links

Tap straight into search results, certification training, and paid apprenticeships for this path.

🔍 DIRECT SEARCH LINKS

Google Trends — demand

is it growing? ↗

Reddit — unfiltered reality

real talk ↗

YouTube — free how-tos

walkthroughs ↗

Upwork — who's paying now

live demand ↗

Google — competitor pricing

what to charge ↗

Hack







Set a saved-search alert on **Indeed** + **LinkedIn** for this exact term — new roles hit your inbox before they're crowded.

Tool Stack — Organized by Category

Every tool for this path, grouped by category. Free tools first, paid last. Tap any logo to open it.







AI Assistants

5 free · 1 paid

	ChatGPT	Writing, ideation, prompts, drafts	Free	↗
	Claude	Long docs, reasoning, coding, agents	Free	↗
	Google Gemini	Google-integrated AI	Free	↗
	Perplexity	AI research with live sources	Free	↗
	Poe	Many AI models in one app	Free	↗
	Grok	X-integrated AI	Paid	↗








AI Builders & Agents

6 free · 0 paid

	Bolt	AI full-stack app builder	Free	↗
	Cursor	AI code editor	Free	↗
	Lovable	Prompt-to-app builder	Free	↗
	Replit	Build + host apps with AI	Free	↗
	v0 by Vercel	AI UI/component generator	Free	↗
	Windsurf	Agentic AI IDE	Free	↗








Automation & No-Code

7 free · 0 paid

	Airtable	Database / CRM / trackers	Free	↗
	Bubble	No-code web apps	Free	↗
	Glide	Apps from spreadsheets	Free	↗
	Make	Visual automation / scenarios	Free	↗
	n8n	Open-source workflow automation	Free	↗
	Softr	No-code apps/portals on Airtable	Free	↗
	Zapier	App-to-app automation	Free	↗




Outreach & Sales

2 free · 5 paid

	Apollo	B2B lead database + outreach	Free	↗
	Hunter	Find + verify emails	Free	↗
	Clay	AI lead enrichment + lists	Paid	↗
	Instantly	Cold email sending + warmup	Paid	↗
	Lemlist	Personalized cold outreach	Paid	↗
	LinkedIn Sales Navigator	Prospecting on LinkedIn	Paid	↗
	Smartlead	Cold email at scale	Paid	↗








CRM

1 free · 2 paid

-  **HubSpot CRM** Free CRM + pipeline Free [↗](#)
-  **Close** CRM built for calling Paid [↗](#)
-  **Pipedrive** Sales pipeline CRM Paid [↗](#)











Web & Design

5 free · 2 paid

-  **Canva** Graphics, thumbnails, templates Free [↗](#)
-  **Carrd** One-page sites (cheap) Free [↗](#)
-  **Figma** UI/graphic design Free [↗](#)
-  **Framer** AI website builder Free [↗](#)
-  **Webflow** Visual website builder Free [↗](#)
-  **Durable** AI site for local business Paid [↗](#)
-  **Relume** AI sitemaps + components Paid [↗](#)

Selling & Monetization

6 free · 4 paid

	Beehiiv	Newsletter + monetization	Free	↗
	Gumroad	Sell digital products	Free	↗
	Lemon Squeezy	Sell software/digital (handles tax)	Free	↗
	Substack	Paid newsletters	Free	↗
	Teachable	Host and sell courses	Free	↗
	Whop	Sell access, communities, products	Free	↗
	Kajabi	All-in-one course/membership	Paid	↗
	Shopify	Ecommerce store	Paid	↗
	Skool	Paid communities + courses	Paid	↗
	Stan Store	Link-in-bio storefront	Paid	↗

Money tip

Stack the **free** tools first. Only pay once a tool is directly making or saving you money.

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THE JOBHACKI ARSENAL

This guide is 1% of what members get

The community unlocks the tools that do the heavy lifting for you:



OmniCut

Upload any video — get back a timestamped, cut-by-cut edit blueprint: hooks, vocal cues, effects and animation calls, all mapped to the viral frameworks behind our own content. You (or your AI editor) just follow the map.



JobHacki Resume Builder

Our exact one-page, recruiter-tested template — auto-built from your LinkedIn in minutes, exported as an editable doc + PDF.



JobHacki Readiness Simulator

Paste any job link. Get tested on what the role actually requires, see your readiness score, and get the fastest study path to close the gaps.



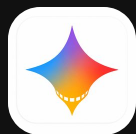
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Every guide and career path we publish — refreshed by 24/7 AI researchers so you never act on stale info.

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Join free today — founding-member pricing locks in before the tools go paid.

WHAT EACH TOOL ACTUALLY DOES



OmniCut

OmniCut watches your entire video the way an elite editor would — every frame, the full transcript, your offer and what you're actually selling — then runs it through the viral frameworks behind our own content. What you get back is a timestamped editing score: your video chopped into 10-second sequences, each with exact vocal cues, audio cues, effect calls and animation directions. Copy a sequence, paste it into Gemini Omni, and generate that cut — then the next, then the next, until the whole edit is done. Runs as a custom GPT inside ChatGPT (you'll need a ChatGPT account), purpose-built for Gemini Omni video editing the day it drops.



JobHacki Resume Builder

Drop in your LinkedIn (or paste your experience) and it rebuilds everything into the exact one-page format we use: tight summary line, education with the details recruiters scan for, metric-driven experience bullets, and the 10-category skills stack that beats ATS keyword filters. Out comes a polished PDF plus a fully editable doc — change any line later without starting over. Single-industry and multi-industry versions included.



JobHacki Readiness Simulator

Paste a real job posting link. The simulator breaks down what that role actually demands — skills, tools, terminology, scenarios — and tests you on it: multiple choice, written answers, even voice roleplay for interviews and sales calls. You get a Readiness Score out of 100 across skill match, tool match, communication and interview readiness, plus the exact study plan to close your gaps — linked straight to the guides, certs and resources that fix them.



Atlas Directory

The full living library: 100+ grounded, step-by-step playbooks across AI businesses, careers, trades, healthcare paths and side income — every one built from people who actually did it, never theory. Our AI researchers monitor hundreds of creators and sources around the clock, so tools, pay data and methods stay current. Search it, filter it, read online or download any guide as a PDF.

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