

CHECKLIST

SIGN YOUR FIRST AI CLIENT



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Most new AI agencies stall four steps before the discovery call. The founder is selling against a positioning, an offer, and a price that were never locked, so every conversation devolves into custom scoping or silence. The first signed client almost never arrives in the inbox of a founder running three flavors of agency at once, pitching with a sentence the buyer cannot picture, quoting custom on every call, and pricing from comfort rather than outcome.

Run this audit before you send the first cold email or LinkedIn request. It takes one focused afternoon. The five sections cover the four pre-market gates of The Agency Stack (Flavor and Stack, Wedge, Offer, Price) plus a final pre-outreach readiness pass. Treat any unchecked box as the next thing you fix this week. Send nothing until every box is checked.

1. Flavor and the Minimum Viable Stack

☐ **Run the Four Flavors fit-check on yourself**

Score Automation, AI Marketing, Agent Builders, and Audit and Advisory against your existing skill, your time horizon to first revenue, and the capital you can spend in the first 90 days. The honest answer is rarely the flavor with the highest revenue ceiling on paper.

☐ **Commit to one flavor for the first 90 days**

Adding a second flavor is the standard scaling move once monthly revenue clears \$5,000 to \$10,000. Add it earlier and you produce zero credible positioning in either.

☐ **Build the Minimum Viable Stack with one tool per category**

One LLM, one automation platform, one outbound stack, one CRM, one payments tool, one project board. The full six-tool set costs roughly \$170 to \$250 per month combined and is enough to deliver the first three engagements.

☐ **Cancel every paid trial outside the six chosen tools**

Tool sprawl drains focus. If a tool is not in the Stack on Friday, end it before Monday.

☐ **Update your LinkedIn headline to match the chosen flavor**

Vague headlines describe nothing the buyer can act on. Replace yours with a flat sentence that names the flavor and the buyer, for example, "AI automations for sales-ops teams at B2B SaaS, 25 to 250 employees."

2. The Wedge Sentence

☐ **Draft the Wedge Sentence in its exact form**

Write one sentence: "I help [specific buyer in a specific industry] [specific measurable outcome] using [specific AI capability], so they can [business consequence the buyer already cares about]." Every word must be one the buyer would use about their own situation.

☐ **Pass the Company Test**

Name three real companies, by name, that fit the buyer description in the sentence. If the third name is hard to produce, the wedge is too narrow on the wrong axis, or too broad on the right one.

☐ **Pass the CFO Test and the Explanation Test**

The outcome must be measurable in a unit a CFO already tracks (hours saved, leads booked, hires made, tickets resolved). The technical approach must fit in three sentences a non-technical buyer can repeat.

- ☐ **Send the Wedge Sentence to three strangers in the target industry**

Friends do not count. Two of the three must read the sentence and name a person at their own company who would take the call. Anything less, the sentence is not earning its weight yet.

3. The Offer Stack

- ☐ **Write the Audit one-pager with a fixed price between \$500 and \$2,500**

Name the deliverable (a 10-page report or a 30-minute video walkthrough), the timeline (typically 10 business days), and what is included. The Audit is the entry product, and most first engagements start here.

- ☐ **Write the Build one-pager with a fixed price between \$3,500 and \$15,000**

Name two specific deliverables, a two-to-four-week timeline, what is explicitly out of scope, and the success criterion the buyer signs off on. Fixed price, fixed scope, no hourly billing.

- ☐ **Write the Retainer one-pager with a 3-month minimum**

Set a monthly price between \$1,500 and \$5,000, name the maintenance scope, define the cadence of reporting, and write the cancellation terms (30 days' notice at the end of any quarter). The Retainer is what a financially healthy agency runs on.

- ☐ **Publish the menu on one page and pin it to every follow-up**

A single page on your site, linked in your email signature, pasted into every discovery-call follow-up email. The menu must be visible before the prospect goes silent, rather than after they ask.

- ☐ **Rehearse the 30-second answer to “what do you sell?”**

Name all three offers and include the prices. When the prices come out without a swallow, the offer is ready.

4. The Outcome Anchor and the Profit Floor

- ☐ **Write one Outcome Anchor sentence per offer**

Phrase it as “This Build saves the buyer roughly \$[X] over [time period]” or “produces roughly [Y units] of additional outcome over [time period].” Use the buyer’s conservative number rather than your marketing-deck number.

- ☐ **Set the Build price at 10% to 20% of the Outcome Anchor value**

A Build that recovers \$90,000 of annual capacity prices between \$9,000 and \$18,000. Price it at 3% and the buyer reads desperation. Push it to 35% and the budget review cuts it.

- ☐ **Run the 1.5x Profit Floor stress test on every price**

Ask: if this engagement takes 1.5 times the hours I estimated, am I still earning at least \$75 per actual

delivered hour? If no, cut the scope or raise the price before the menu publishes.

☐ **Pre-decide your reply to "can you do something small and custom for less?"**

Two written responses: quote the custom request at twice the menu rate so it self-selects out, or redirect into the Audit. Decide once, on paper, before the first sales call.

5. Pre-Outreach Readiness

☐ **Draft a one-page Scope Lock template for the Build**

A signable document that names the single outcome, the deliverables, what is out of scope, and the success criterion. The Scope Lock is the entire contract for the 14-day Build sprint, so do not start the sprint without one.

☐ **Activate Stripe and prepare a clean invoice template**

Connect Stripe, test a \$1 charge end to end, and save an invoice template with your business details and the menu prices. A prospect who is ready to pay should not be slowed down by a 30-minute admin scramble.

☐ **Build a Notion or Airtable pipeline tracker**

Five columns at minimum: contacted, replied, discovery call booked, proposal sent, closed. The tracker is how you survive the first 60 days when the volume of outbound makes mental tracking impossible.

☐ **Schedule the recurring 90-minute outbound block in your calendar**

Same time, every business day, non-negotiable for the first 60 days. The moment the first engagement closes, outbound loses to client work unless it is already pinned to the calendar.