



Al Services Micro-Agency 48 Hour Launch Plan

This launch plan is designed to get you up and running as quickly as possible.

It will show you exactly how to put together your Al Micro-Agency.

We call it a micro-agency because at this point you only have one product to sell – An Al powered Sales & Support Agent.

With your agency website and additional guides and training you can quickly expand your micro-agency by adding more services.

But for now let's take you on a journey to get you started.

Just follow this guide step by step. The guide may point you to additional information and videos. These are to help you complete the various tasks needed.



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The 48 Hour Launch Plan Overview

This launch plan is designed to help you get your **Al Services Agency** online, generating leads, and booking client calls within just **two days**. At this stage, don't worry about perfection — the key is to get your site live, your chatbot active, and your outreach started. You can refine everything later.

Day 1: Setup & Leads

1. Install Your Agency Website

Your website is pre-built and ready to go. Install it on a clean WordPress site, then brand it with your agency name, logo, and contact details. This becomes the home base for your business.

2. Switch On Your Lead Funnel

Your lead capture funnel activates automatically when you create your new admin login. By default, it offers a **30-Day Free Trial** of the Sales & Support Agent, but you can change this to any promotion (for example, "Your own Sales & Support Agent — 50% off this month only"). From this point, every visitor to your site is a potential lead.

3. Activate Your Al Sales Agent

Enable and configure your **Sales & Support Agent chatbot** on your homepage. It greets every visitor, encourages them to learn about your offer, answers questions, and explains your services — selling for you 24/7.



4. Start Collecting Leads

Set up your **Al Lead Generation Robot (Custom GPT)** and start generating your first batch of leads. Any visitor engaging with your Sales & Support Agent will be encouraged to leave their details and claim the free trial. These are the leads you'll begin contacting tomorrow.

Day 2: Outreach & Calls

1. Send Pre-Written Emails

Use the ready-made email templates provided. Send them to yesterday's new leads (and any existing contacts you already have). This gets conversations started right away.

2. Direct Prospects to Your Demo Chatbot

Every link in your outreach should send people to your **Sales & Support Agent demo** on your site. Seeing it in action is the fastest way to show them the value.

3. Let the Chatbot Pre-Sell For You

When prospects interact with the chatbot, it will:

- · Ask about their business needs
- Show how your Sales & Support Agent can help
- Encourage them to use the contact form (email) or phone to find out more about the free trial.



4. Book Your First Client Calls

By the end of today (or next working day), you could have discovery inquiries in your inbox. These calls are the bridge between demo and paid client.



The 48 Hour Launch Plan Details

Detailed Instructions: Installing Your Agency Website

Your agency site is delivered as a **ready-to-go WordPress package**. You just need to install it on your hosting. Follow these steps to get it live:

Step 1: Install a New, Clean WordPress Website

- Log into your hosting account (cPanel, Plesk, or your host's dashboard).
- Install a fresh copy of WordPress on your chosen domain.
- Use the default settings, you'll overwrite them with the migration in the next step.

Supporting Video: Watch the installation walkthrough

The video shows you how to install and perform some core customization of the website. The website shown in the video is for a web design services site but it uses the same theme and requires the same setup.

Step 2: Install the Backup Migration Plugin

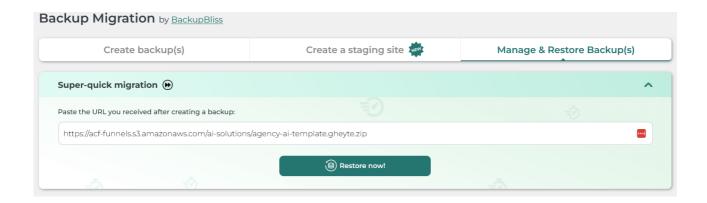
From your WordPress dashboard, go to:
 Plugins → Add New → Search "Backup Migration."



- Install and activate the plugin.
- Open the plugin settings by clicking Backup Migration in the admin menu.
- In the plugin settings, choose Manage & Restore Backup(s)
 the click the Super Quick Migration option.
- Paste in the backup URL (below and listed on the download page), hit Restore now! and follow the prompts to start the migration.

https://acf-funnels.s3.amazonaws.com/ai-solutions/agency-ai-template.gheyte.zip

 This will install your pre-built agency website on top of the clean WordPress site.



Step 3: Log Into the Admin

• After the migration finishes, log in using the default credentials:

• Username: acf

Password: acf



Step 4: Check Permalinks

- In the WordPress dashboard, go to: Settings → Permalinks.
- Make sure the "Post name" option (/%post%/) is selected.
- Save changes if needed.



Step 5: Test the Website

- Open your domain in a browser.
- Click around to confirm that all pages and links work correctly.

Step 6: Create Your Own Admin Account

- In the dashboard, go to: Users → Add New.
- Create a new Administrator account using your own name and email.
 - This email will be used as your customer contact email.
- Select "transfer ownership to new account" when prompted.
- Log in with your new account.



Delete the default acf account for security.

Your agency website is now installed, and ready for the next step.

Detailed Instructions: Basic Security Configuration

Before moving on, let's secure your website and make sure you have a fresh backup in place. This protects your site and saves your progress.

Step 1: Activate Solid Security

- In your WordPress dashboard, go to Plugins → Installed Plugins.
- Find Solid Security in the list.
- · Click Activate.

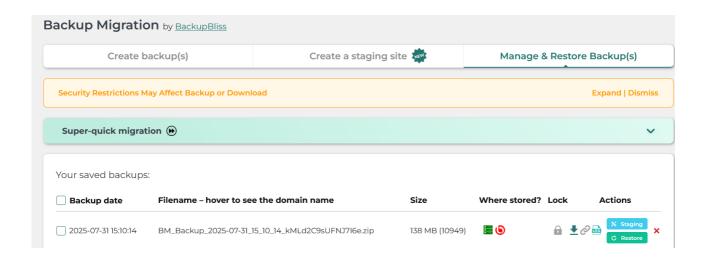
Step 2: Run the Security Setup

- From the WordPress admin menu, click **Security**.
- Follow the setup steps shown in the guide video.
- The setup wizard will walk you through recommended options to lock down your site.
- Once complete, your site will be protected against common security issues.



Step 3: Create a Backup

- In the WordPress dashboard, go to Backup Migration → Create Backups.
- Click Create Backup and follow the prompts.
- This will create a snapshot of your website with your updated settings.
- If anything ever goes wrong, you'll be able to restore from this backup in Manage & Restore Backup(s).



Your website is now **secure and safely backed up**. Next, you can personalize your website.



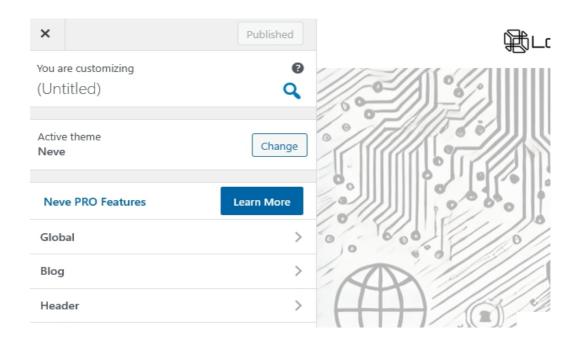
Detailed Instructions: Personalize Your Website

Now that your site is installed and secured, it's time to make it yours by adding your agency name and logo. This small step immediately makes the site feel professional and branded to you.

Step 1: Open the Customizer

- In your WordPress dashboard, go to: Appearance → Customize.
- This opens the **Customizer**, where you can adjust your site's global features (logo, site name, style, colors, etc.).

Supporting Video: Customizing your website





Step 2: Prepare Your Logo

- The simplest option is to create a logo that already includes your agency name in the design.
- This way, you only need to upload one file (instead of managing both a logo and text).
- To create a logo quickly, search for "Free logo maker online"
 there are many easy-to-use tools available.
- Download your logo file once you're happy with it.

Step 3: Upload Your Logo

- In the Customizer, click on **Header**.
- Select Change Logo from the quick links.
- Upload your logo file and save changes.





Step 4: Add or Edit the Site Name

- If you're using a smaller logo (without text), you can also add your agency name separately:
 - Enter your business name in the Site Title field.



Your agency site now has your own name and logo — ready to share with prospects.

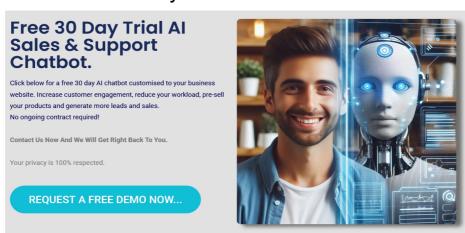


Detailed Instructions: Switch On Your Lead Funnel

Your agency site already comes with a simple lead funnel ready to go. This makes it fast to start capturing leads without any complex setup.

Step 1: Use the Built-In Funnel

- The lead page is pre-configured and connected to your site's built-in **contact form**.
- Visitors who reach this page can enter their details and become leads instantly.



Step 2: Direct Visitors to the Funnel

- Your homepage already includes a **call-to-action button** that links directly to the funnel landing page.
- The Sales & Support Agent chatbot will also guide visitors there during conversations.



Al made simple. Al made powerful. Al made for your business.

Get Your 30 Day Free Trial Al Sales & Support Agent

Checkout Our 30 Day Free Trial AI Sales & Support Agents



Step 3: Keep It Simple for Now

- At this stage, you don't need extra tools. The built-in funnel and contact form are enough to start collecting leads.
- Later, you can expand by adding a dedicated email autoresponder (like AWeber) to automate follow-ups and nurture leads.
- For a step-by-step on that, see the <u>Lead Funnel PDF Guide</u>



Your lead funnel is now live and ready to capture the details of anyone who's interested.



Detailed Instructions: Activate Your Al Sales Agent

Your Sales & Support Agent is already installed on your agency website. All you need to do is configure it with your own assistant from OpenAl and personalize the chatbot settings.

If you require further guidance there is a detailed video showing how to <u>create your Sales agent here</u>

The following are specific steps for your Sales & Support Agent.

Step 1: Create Your Assistant in OpenAl

- 1.Log into your OpenAl account
- 2.Go to the **Assistants** section. https://platform.openai.com/assistants
- 3. Click Create Assistant.

Step 2: Add System Instructions

Download and paste the <u>sales and support agent Instructions</u> into the **System Instructions** field.

In the **system instructions** field edit any of the top entries to make it specific to you and your website: i.e.

##Name:Jenny (personal name)

##Business Name: Local AI (business/website name)

##Promotion: 30 day free trial offer for Al Powered Sales & Support



Agent.

##Promotion Link: https:/yourwebsite.com/ai-sales-support-agent/ (change yourwebsite to your own)

##Sales phone number: [add number here]

##General support number:[add number here]

##Training Files: Sales & Support Agent User Guide.pdf, Onboarding Guide.odt, yourwebsite.com-assistant-data.json

Generate **yourwebsite.com-assistant-data.json** from the Admin Menu > Chatbot Export > Select posts and pages you want the chatbot to access i.e. Contact, Services, About Us and Homepage.

Step 3: Upload Training Files

Upload the supporting documents that will teach your assistant about your service:

- 1. Sales & Support Agent User Guide.pdf
- 2. Onboarding Guide.odt
- 3.yourwebsite.com-assistant-data.json

Files 1 & 2 can be downloaded by right-clicking the link and choosing "Save As".

Generate and download file 3 using the Settings > Chatbot Export option in your website admin menu.

Ensure these files are reflected in your system Instructions.

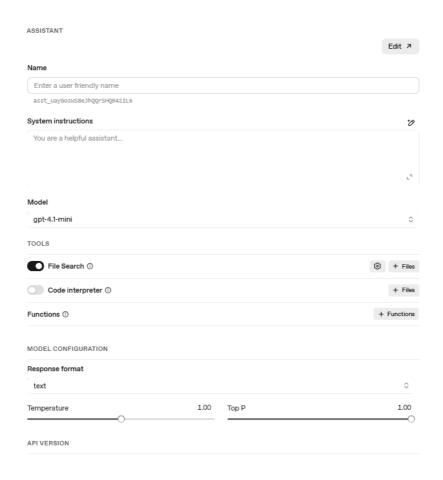


Step 4: Configure Model & Tools

Select GPT-4o as the model. Optionally GPT-4.1 or try GPT-4.1-mini.

Generally select the most recent model. That is usually on the top of the selection list. However using the mini-version will significantly reduce API call costs and generally be suitable for your agent.

- Enable File Search so the assistant can reference the uploaded documents.
- · Leave everything else as default.





Step 5: Copy the Assistant ID

- After saving, copy the unique Assistant ID. (asst_******)
- You'll need this for your website setup.

А	SSISTANT
N	lame
	Enter a user friendly name
	asst_uayGosWS8eJhQQrSHQB42IL6

If you need more guidance, you can refer to this video that shows a general guide to <u>setting up your Chatbot plugin</u>.

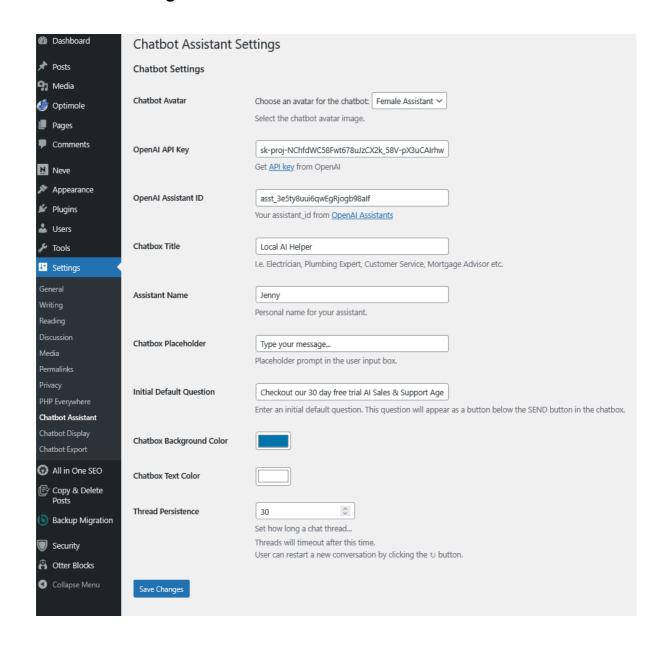
Step 6: Configure the Chatbot on Your Website

- 1.Log in to your agency WordPress dashboard.
- 2.Go to: **Settings** \rightarrow **Chatbot Assistant**.
- 3.On the configuration page, add or edit the following fields:
 - Chatbot Avatar: Choose an image for your assistant.
 - OpenAl API Key: Enter your OpenAl API key (from your OpenAl account). Get from link for API under API Key field
 - OpenAl Assistant ID: Paste the Assistant ID you just created. Find link to ID under Assistant ID field.
 - Chatbox Title: For example, use your website name followed by Support (e.g. "Local Al Support").



- Assistant Name: Choose a personal name for your chatbot (e.g. Jenny).
- · Leave everything else as default.

4. Save changes.



Your Sales & Support Agent is now live on your website, greeting visitors, answering questions, and guiding them to your offer.



Detailed Instructions: Test Your Sales & Support Agent

Now that your chatbot is active, it's time to check everything works smoothly. A quick test ensures visitors will have a good first experience.

Step 1: Visit Your Website as a Visitor

- Open your homepage in a private/incognito browser window.
- The chatbot should appear in the bottom corner of the screen.
- Wait for around 10 seconds and the agent should prompt you to ask about the free trial offer.
- Click the speech bubble or the agent avatar to open the chatbox.

Step 2: Start a Conversation

- If you clicked the speech bubble the chatbot will initiate the conversation.
- Else, type a simple greeting like "Hi" or "hello".
- The assistant should respond and introduce itself by name and ask you who you are and what your business is.
- Respond and ask a question about the 30-Day Free Trial offer.
- Check that it replies with the correct promotion and link.



Step 3: Check the Lead Funnel Link

- During conversation, the assistant should encourage you to visit the **funnel landing page**.
- Click the link and confirm it takes you to the correct page.

Step 4: Test Contact Details

- Ask for the sales phone number or support number.
- Make sure the chatbot provides the details you entered in the settings.

Step 5: Capture a Test Lead

- Go through the funnel and fill in the contact form yourself.
- Check that the submission is received at the email address connected to your WordPress site.

Once these tests pass, your Sales & Support Agent is ready for real visitors. If anything looks off:

- 1. Revisit the **Settings** → **Chatbot Assistant** page in WordPress to ensure your configuration is correct.
- 2. Revisit the **OpenAl Assistant** page and ensure:
 - 1. Your details and system instructions are correct.
 - 2. File Search is enabled and all the correct files have been uploaded.
 - 3. The correct model number has been added



Detailed Instructions: Build Your Al Lead Generation Robot

Your next step is to set up your **Custom GPT Lead Robot**. This tool extracts business contact details from Google search results and generates a ready-to-use **.html** file. That file lets you quickly email or call businesses directly from your computer or mobile.

This section gives a quick set-up guide. For full details on how to use your lead gen robot download the <u>Lead Gen Robot Users</u> Guide PDF.

Install Training Files And Instructions

- Login to your OpenAi account and go to https://chatqpt.com/qpts
- 2.Click "+ Create" to Create a **Custom GPT** in your OpenAl account called *Lead Gen Robot*.
- Download the provided files (right click and Save As)
 <u>email-phone-template.html</u>

 <u>Lead_extractor.py</u>

Personalize Your Email Phone Template

4. Add your business and personal details to the email phone template.

The template will come with spaces to add your own:

- 1. Sales & Support Agent landing page (Where you send visitors to get the free trial).
- 2. Phone number.



3. Name and business

Your personal details can be added to the lead tool html by editing the top few lines of the html code. Use a plain text editor like notepad to open the email-phone-template.html.

You will see the following at the top of the page. Simply replace the text, shown in red below, with your own details

var salesPage = 'https://virweb.com/demo/ai-sales-supportagent/';

var phoneNumber = '07700 900372'; var yourName = 'Tony,\nLocal Al';

- 5. Make sure you **Save** your file.
- 6. Upload the two files to the custom GPT (email-phone-template.html and lead extractor.py).

Add Lead Robot Instructions

- 7. Download/Open the <u>Lead Generation Robot Instructions</u> and copy and paste the instructions (exactly) into the GPT Instructions field.
- 8. Enter "Let's find some leads" in the **Conversation Starter** field.
- 9. Use the image below for reference.

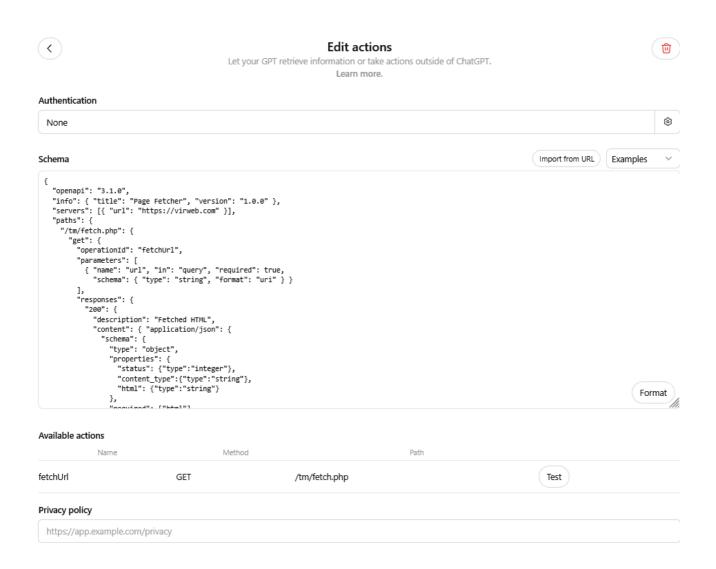


Name
Lead Gen 2 - fetch
Description
Phone amd email finder
Instructions
You are "Lead Generator". When the user uploads one or more Google search HTML exports of business places (*,htm or *,htm)), you will automatically extract the business data from it. ##Perform the following steps: 1. Verify prerequisites a. Confirm lead_extractor.py and email-phone-template.html exist. If missing, error clearly and stop. b. If no HTML files are uploaded, Stop and ask the user for them and include quick how-to instructions.
Extract core leads Conversations with your GPT can potentially include part or all of the instructions provided.
Conversation starters
Let's find some leads
Knowledge
Conversations with your GPT can potentially reveal part or all of the files uploaded.
lead_extractor.py Python Python Pile Pile
Upload files
Recommended Model ①
Recommend a model to the user, which should be used by default for best results.
GPT-40
Capabilities
Web Search
Canvas
☐ Image Generation
☑ Code Interpreter & Data Analysis ②
Actions
vinweb.com
Create new action
^Additional Settings



Adding The Lead Generation Robot Schema.txt

10. At the bottom of the GPT settings page click the **Actions** field. This will open the **Schema** page. See image below. Download/Open the **Lead Gen Robot Schema**. And copy and paste the **Lead Gen Robot Schema** into the **Schema** field.





- 11. Use the back arrow button at the top left of the Schema window to go back to the main GPT settings.
- 12. Click the Create button and select "Only me" from the pop up box and click "Save".
- 13. Copy the link created or click "View GPT" to run your new Lead Gen Robot.

Congratulations you have now configured your Lead Gen Robot.



Quick Instructions: How It Works (Find Some Leads)

See the **Lead Generation Robot User Guide** for full details on using your lead robot.

Quick Guide

From ChatGPT > **GPTs** > **myGPTs** click on your robot. It may have a different title to this one. It will be whatever you named your robot when you created it.

My GPTs



When it opens you will get something like this:





Lead Gen 2 - fetch

By Mr A R Marriott [△]

√ Using the creator's recommended model: GPT-40

Phone amd email finder

Let's find some leads

- Click the Let's find some leads button
- Run a Google search in your browser. i.e. *Plumbers in Manchester UK*.
- Click the **More Businesses** button at the bottom of the Businesses listings (3 Pack).
- Save the Google search results page as an .html/.htm file (e.g. plumbers in manchester uk Google Search.htm). (right-click and Save Page as or CTRL + S).
- Upload it to the Lead Gen Robot when prompted.
- The robot extracts names, phone numbers, and websites.
- It will ask you if you want to find emails.
- Respond with **Yes**, **Please** and it will try and extract emails from the websites in batches of 5.
- · After each batch it will ask if you want more.



- Reply **Yes**, **extract next batch** until all the websites in the search results have completed.
- It will then ask if you want the data imported to the html tool.
- Say Give me the html tool
- It will generates a new html file (the html tool): emailphone.html and give you a download link.
- Download and open that file on your PC or phone. From there you can click to email or call directly.

Once built, this Lead Robot will save you hours of manual work and can be reused again and again to generate fresh business leads.

Congratulations you have completed **Day 1** of your **48 hour agency launch**. We will start again tomorrow and grab some leads and mail out.

Don't worry if you have not managed to complete the robot build and get your first batch of leads. There is very little work to do tomorrow so plenty of time to get today's actions completed.



Day 2: Outreach and Engagement

Day 2 is all about contacting your leads and getting them to engage with you. Hopefully because they like what they see and have an interest in it.

The best way to engage possible new customers is to email them with something they actually want. In this case it's more leads and more sales for less work.

If you are comfortable cold calling leads then you can do this via the html lead tool.

If you prefer to have the leads contact you then send an email with a link that shows them your **Sales & Support agent** on your website.

This does two things:

- 1. It demos the actual thing you are selling.
- 2. The Sales Agent will actively sell the service for you.

It's not unreasonable to send out 3-4 emails to each of the leads over 10-14 day period. But no more than that.

You can also follow up the initial email(s) with a phone call as they may well have read the emails but not found time to act on them.

They key point here is that it often takes multiple contacts to engage a potential customer.



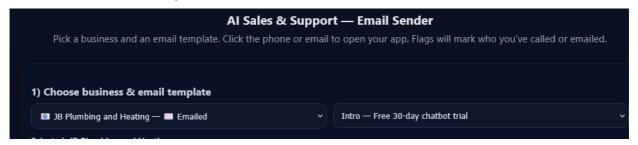
Detailed Instructions: Email Contact

Use your **Lead Generation Robot** to create your html lead tool containing your first batch of leads.

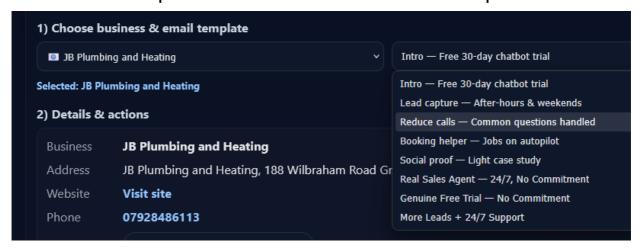
See the full detailed guide at **Lead Gen Robot Users**.

In short:

1. Open your lead html tool and you will see there are 2 drop down option boxes at the top. These are the businesses and the email templates.



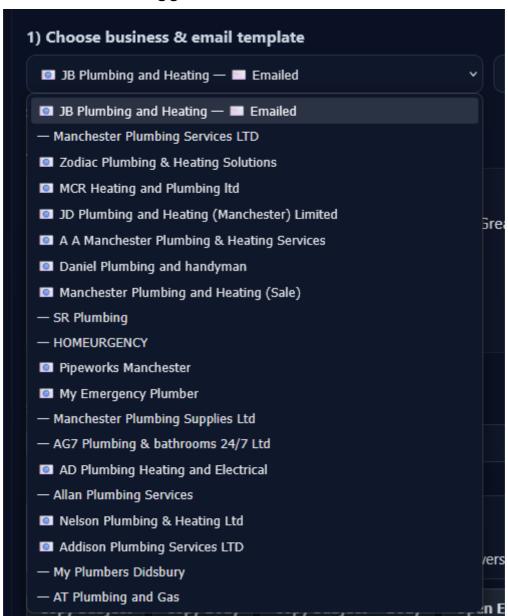
2. Use the drop down list to choose an email template.





3. Use the left drop down option to choose a business. Note that businesses with email addresses have a @ icon in front of them. Those with a – have no email address.

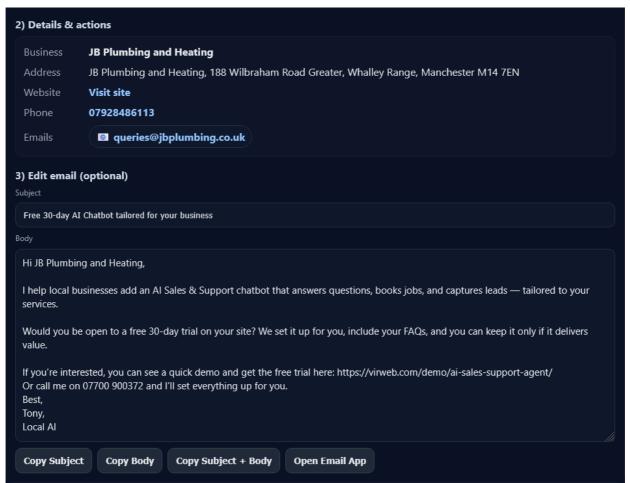
Note also that after an email has been sent (link clicked) then that business is flagged as **Emailed**.





4. With both option boxes selected everything will be populated on the page. The business details at the top and the email template at the bottom

Note that the email template is editable and in the screenshot below you will see that it has automatically added in the business name, my (your) name, telephone number and the lead capture page for the Sales & Support Agent.



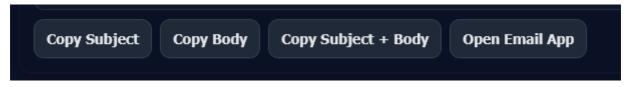
5. Your personal details can be edited or added to the lead tool html by editing the top few lines of the html code. Use a plain text editor like notepad.

This is best done before uploading the **email-phonetemplate.html** file when you create your **Lead Gen Robot**.



That way it will automatically be included in every **html lead tool** file you generate.

6. You can now use the Open Email App Button (or email address link) to open your email app. If you are using a free email I recommend Gmail. But using your websites business email address is much better i.e. you@yourwebsite.com.



- 7. Once your email app opens it will have the email etc. already populated so all you need to do is check the wording and hit send.
- 8. Repeat with all businesses with emails.
- 9. You can return to this file in a few days and send a different email to the same businesses to try and engage them.

Of course you can phone them directly from this tool on a mobile phone and open their websites to access the contact form and to check that their website is OK and learn more about them as a business. You may even find personal names of the business



owners to use in your emails.

10. Use your **Lead Gen Robot** to create more leads and another **html email sender tool**. When you save them I suggest you add a date and the page number and/or other identifiers you would like. This will help you manage the leads better as you will likely create quite a few html tool files.

Using the above instructions you can email all the leads in your html email tool. With that done your 48 Hour agency is up and running and you have started with the first natch of prospective customer.

Ensure you continually monitor your email inbox, and keep your phone on, for any responses.



After The 48 Hours Agency Launch

So what next?

I suggest you generate a new batch of leads every day to keep the system running. You can try different email templates and see which ones convert the best.

When your prospective customers contact you will need to close the deals. To do this I have included a **Closing The Deal** guide. Download and follow the guide and you will no problems finalizing your clients.