

Your Agencies kit

A sharper offer, researched leads, call prep and proposals, client onboarding and monthly reports, all drafted for your OK.



TIME

10 minutes

FOR

Small agencies (SMMA, AI automation, web and design, lead-gen)

VERSION

v1.0

Your Agencies kit

01 Your kit team

These three join Michael and the Basics team when you click **Add 3 team members** on the **Agency team** card in **Settings → General**.

02 What this kit does

Every item below is a draft, a proposal or a report. You read it, change what you like and send it yourself.

03 Connect first

04 Your first week

Day 1 is the same for every kit: fill in your business profile with Michael. Then, one request a day.

05 Good to know

■ BEFORE YOU START

- ☐ Locally set up with the Basics team (guide 01)
- ☐ Support mailbox connected (guide 03)

Your kit team

These three join Michael and the Basics team when you click **Add 3 team members** on the **Agency team** card in **Settings → General**.



Ezra GROWTH LEAD

Sharpens your niche and offer, researches leads from public sources and hands them to Ava, preps your discovery calls and writes proposals.



Maya CLIENT SUCCESS

Onboards won clients, keeps the delivery tracker, drafts client mail and Monday client updates, and checks deadlines on Wednesday.



Jonas CLIENT RESULTS

Writes the monthly report per client, case studies with written permission, and a weekly renewal, risk and upsell check.

reasons, unanswered questions in your chats, and save and win-back drafts for members who leave. Jade makes members feel at home: welcome DMs, a first-week path, a weekly calendar of prompts, events and wins threads, and reply drafts for member questions. Rio grows the community: affiliate program and swipe copy, honest launches and promos, and Content Rewards (clipping) briefs with the budget math. They only read Whop and Discord; every post, DM, email, promo code and campaign is a draft you check and post yourself. Works together with the Business basics team that comes with every kit.

- ☒ **Kai** — Member pulse & retention: daily numbers, Monday churn report, unanswered questions, save and win-back drafts
- ☒ **Jade** — Member experience: welcome DMs, first-week path, weekly engagement calendar and reply drafts for member questions
- ☒ **Rio** — Community growth: affiliate program and swipe copy, honest launches and promos, Content Rewards clipping briefs

Team folder (shared files, plans and drafts): ~/Documents/Locally [Change](#)

- Needs Whop (optional) — strongly recommended: read members, cancellations and reasons, payments, reviews, affiliates and Whop chats/forums
- Needs your Discord server (optional) — if your community is on Discord: find unanswered questions and quiet channels (read-only, the bot never p
- Needs your mailbox (optional) — to read member emails and leave reply and win-back drafts [Connect](#)
- Needs Kit (optional) — so onboarding and win-back emails can wait in Kit as draft broadcasts [Connect](#)
- Needs Klaviyo (optional) — so onboarding and win-back emails can wait in Klaviyo as draft campaigns [Connect](#)

[Add 3 team members](#)

READY-MADE TEAM **Trading & picks community team**

Three AI colleagues for the busywork of a paid trading-education or sports-picks community. Owen checks your posts and sales pages for risky claims and turns your own trade/pick log into honest stats (every loss included). Clara writes pre-market or slate recaps from public sources and builds your lesson library and glossary. Felix drafts answers to member questions, plans AMAs and challenges, and tells you every Monday who left and why. They never write signals, picks or trade calls, and nothing is posted without you — Whop and Discord are read-only. Works together with the Basics team that comes with every kit.

- ☒ **Owen** — Compliance & honest numbers: checks posts and sales pages for risky claims, and turns your own trade/pick log into honest stats
- ☒ **Clara** — Education writer: pre-market or slate recaps from public sources, the weekly recap, and your lesson library and glossary
- ☒ **Felix** — Community manager: welcomes new members, drafts answers to member questions, keeps the FAQ, plans AMAs and challenges, and reports every Monday who left and why

Team folder (shared files, plans and drafts): ~/Documents/Locally [Change](#)

- Needs Whop (optional) — so Felix can read memberships, cancellations, reasons and member questions on Whop for support rounds and the churn

Settings → General: your kit card. Untick anyone you do not need yet, then Add 3 team members.

What this kit does

Every item below is a draft, a proposal or a report. You read it, change what you like and send it yourself.

- Your niche and offer as a productized service with tiers, scope and honest guarantee wording.
- Lead lists from public sources, scored against your ideal client and handed to Ava, who drafts the outreach the law allows. You send.
- A prep brief before every discovery call (from Calendly or your own call list) and a recap draft after it.
- Proposals and statements of work with scope, timeline and price, as drafts.
- An onboarding checklist, access request drafts and a kickoff agenda for every won client. Never passwords.
- A delivery tracker per client, a daily client mail round with reply drafts, Monday client update drafts and a Wednesday deadline check.
- A monthly report per client from the numbers you paste or from read-only Meta ads insights.
- A weekly retention check: client health, renewals, unpaid retainers, risks and upsells that fit a real need.

IMPORTANT Everything is a draft. The kit never mails a lead or a client, never agrees to extra scope or free work, and never promises a date or a result you did not confirm.

Connect first

APP	WHY	GUIDE
Support mailbox	Ezra reads prospect mail, Maya reads client mail, Ava reads outreach replies, Nina takes the rest. All replies land as drafts	03
Calendly (optional)	Ezra reads booked calls and writes a prep brief every morning	03
Notion (optional)	Maya keeps one client page per client under a page you share	03
Stripe or Moneybird (optional)	Jonas spots unpaid retainers, Finn drafts invoices	03
Facebook & Instagram ads (optional)	Jonas reads client ad results for monthly reports	03

NOTE

Without Calendly, keep your calls in `agency/calls.md` or paste them. Ezra works from that file.

04

Your first week

Day 1 is the same for every kit: fill in your business profile with Michael. Then, one request a day.

1 Day 1, the profile

Click **Get to know my business and fill in the profile** in Michael's panel and answer his questions. Mention what you deliver, who your current clients are, your prices and the niche you want more of. Then type: "Ezra, sharpen my niche and offer into one sentence and three packages." The result lands in **Documents** → **Locally** → **agency**.

2 Day 2

Type: "Ezra, research and score 20 leads that fit my niche and hand the best ones to Ava for outreach drafts." Ezra keeps the list in `agency/leads/leads.csv`. Ava picks the legal channel per country and leaves email drafts in your mailbox's **Drafts** folder, or call scripts and LinkedIn notes as files.

3 Day 3

Type: "Maya, draft replies to client mail and set up a delivery tracker for my current clients." Reply drafts land in your mailbox, the tracker in `agency/clients/`. From now on Maya's daily client mail round and Monday client updates run on a schedule.

4 Day 4

Type: "Ezra, write a discovery call script and prep notes for my next call." With Calendly connected, a prep brief arrives every morning for that day's calls. After the call: "Ezra, draft the recap mail for today's call with [prospect]."

5

Day 5 to 7

Type: "Jonas, draft the monthly report for [client]." Paste the numbers he asks for, in one message for all clients. Then: "Jonas, which clients are at risk and where is there room for an upsell?" On Friday, review his retention check.

TIP

Requests that work well for this kit: "Ezra, write a proposal for [prospect] based on package 2.", "Maya, make an onboarding checklist and access requests for [new client].", "Jonas, write a case study for [client] once they have given permission.", "Maya, what is due this week?"

05

Good to know

WATCH OUT

Four people read the same inbox and each takes only their own mail. Prospects are Ezra's, active clients are Maya's, outreach replies are Ava's, everything else is Nina's. A mail with a draft already counts as handled, so you never get two drafts. Ezra never contacts leads himself: outreach is Ava's and she follows the rules of your country and the prospect's.

- After you add the team, Maya's daily client mail round, Monday client updates and Wednesday deadline check, and Jonas's weekly retention check switch on in **Triggers → Schedules**. Your computer must be on and Locally open. Toggle any job off there or ask Michael to pause it.
- Files land in **Documents → Locally → agency**: `agency/offer`, `agency/leads`, `agency/pipeline.md` and `agency/clients/<client>`. Email replies land in your mailbox's **Drafts** folder.
- Case studies are written only with the client's written permission and verified numbers. Jonas names a source for every number and never claims a result the agency cannot show.
- Access requests ask for least-privilege user or partner access. No passwords or keys are ever stored in a file.

Stuck? We help.

Send us a message with a screenshot of what you see. A real person answers.

SUPPORT

Whop chat: whop.com/locallyai · Email: info@locallyai.nl

WEBSITE

locallyai.whop.site

WHOP

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LINKEDIN

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