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2026 EDITION

EXECUTION MANUAL

Your digital agency with AI

How to go from working alone to an organized agency: services, pricing, processes, clients and team, without losing quality or margin.

WRITTEN BY

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This material is educational: it teaches work processes and the judgment to apply them. It does not guarantee sales, clients or financial results: those depend on execution, the market and each person's effort. It is not a substitute for professional legal, accounting or tax advice.

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INTRODUCTION

Before you start

Who this book is for, what you'll have when you finish it, and the question worth answering before you say “I have an agency.”

Almost every small agency is born the same way: someone working alone starts getting more requests than they can handle. And almost all of them die the same way: they keep growing with the same disorganization they had when they were one person.

There comes a moment when working alone is no longer enough: three clients waiting, two unsent proposals, a WhatsApp message unanswered for four days and the feeling that a week off sick would bring everything down. That moment looks like a time problem. It's really a **system** problem.

This book is about building that system: what you sell, how you charge, how it's produced, how clients are organized and, only then, how to bring people on. An agency isn't a group of people doing things: it's a repeatable way of delivering a result that works even when you're not watching every detail.

Who it's for

This book is useful if:

- You already sell a digital service (websites, landing pages, social media, advertising, content) and want to stop depending only on your hours.
- You have more work than you can do well, or you're close to it.
- You want to build a small, organized agency, not a fifty-person company.
- You use AI and want quality that doesn't depend on luck.

If you don't have any clients yet, start with the previous books: *Your First Website with AI* teaches you to produce and *Your First Clients* teaches you to find people to work with. This book assumes you already know how to do both.

What you'll have when you finish

- [ ] A clear decision about what you're building: freelancer, studio or agency.
- [ ] A service menu with an anchor service and add-ons that sell themselves.
- [ ] Prices calculated from your costs, with a margin that lets you grow.
- [ ] The agency's five core processes written down, so they don't live only in your head.
- [ ] A client onboarding that starts every project on the right foot.
- [ ] A way of producing with AI that has quality control built in.
- [ ] A board for organizing clients, projects and conversations.
- [ ] At least one service on a monthly retainer, so you have recurring income.
- [ ] A criterion for knowing when and whom to hire first.
- [ ] A five-number dashboard to know whether the agency is healthy.

How it's organized

Part I is the foundation: what you're building, what you sell and at what price.

Part II is the system: processes, onboarding, production with AI, client organization and monthly retainers. It turns a very busy person into a working business.

Part III is growing: the first hire, the numbers you need to watch and how to scale without breaking what already works.

At the end there are four annexes: the service menu and pricing template, the process templates, a prompt library for the agency and the sources.

A note on scope

This book teaches you to **organize** a digital services business: what to sell, how to charge, how to produce and how to grow in an orderly way. It isn't accounting, tax or legal advice. When we talk about invoicing, contracts or hiring, you'll find general criteria and the recommendation to consult a professional in your country. Nor does it promise income: yours will depend on your market, your prices and your execution.

> **THE "WE'RE AN AGENCY" TRAP**
>
> Many freelancers start saying “we” before they have a team, to look bigger. It's a double mistake: the client usually notices, and you commit to a scale you don't have yet. Being one person who works very well is an asset, not something to hide. An agency is built; it isn't declared.

01

Freelancer, studio or agency

The four stages a digital services business goes through, what changes in each one and how to know which one you're in and which one you want to reach.

“Agency” isn't a word that describes a size. It describes a way of working: the client buys from a system, not from a person. You can have a two-person agency and a ten-person freelance operation.

Most people use “freelancer” and “agency” as if they were the same thing with a different headcount. They aren't. The real difference lies in **who the result depends on**. If the work turns out well only when you do it, you're a freelancer, even if you have helpers. If it turns out well because there's a process anyone on the team can follow, you're starting to be an agency.

The four stages

Almost every digital services business goes through these stages. You don't have to go through all of them, and staying in one isn't a failure: it's a decision.

STAGE	WHAT IT LOOKS LIKE	THE LIMIT
1. Freelancer	You do everything: sell, produce, bill, serve clients.	Your hours. When they fill up, you stop growing.
2. Freelancer with support	You're still the face and the brain, but you delegate one-off tasks to other freelancers.	Your ability to coordinate. Everything goes through you.
3. Studio	A small, stable team with clear roles. You sell and supervise.	Quality depends on you reviewing everything.
4. Agency	Written processes, defined roles, someone else can sell or supervise.	Processes and the market, not a person.

EACH STAGE HAS ITS OWN CEILING

Moving from one stage to the next isn't automatic: it requires changing how you work. The most common mistake is trying to jump from stage 1 to stage 4 by hiring people, without having built the processes of stages 2 and 3. The result is a freelancer with employees: more costs, more chaos and the same dependence on you.

The signs you've hit the ceiling

How do you know it's time to move to the next stage? These are the clearest signs:

- [ ] You turn down work or postpone it because you don't have time.
- [ ] It takes you days to send proposals you used to send in hours.
- [ ] Clients wait longer than you promised.
- [ ] You do tasks someone else could do just as well for less money.
- [ ] You can't take a week off without something breaking.
- [ ] Your income doesn't go up even though you work more hours.

If you ticked three or more, the next step probably isn't getting more clients: it's **organizing how you serve the ones you already have.**

Three agency models

Besides the stage, it's worth deciding what kind of agency you want to be. There are three main models, and each has a very different business behind it:

The specialist

Does one thing very well, for one type of client. “Booking websites for medical practices.” “Instagram advertising for real estate agencies.” It's the easiest model to sell, produce and scale, because everything repeats. Its risk is depending on a single market.

The full-service niche agency

Does several things for the same type of client. “Everything digital for gyms: website, social media, advertising and automations.” It bills the most per client, because it solves a lot for each one. Its risk is that each service requires a different skill.

The generalist

Does several things for anyone. It's the most common model when starting out and the hardest to grow: every client is a new project, nothing repeats, processes never stabilize and the marketing speaks to everyone, which means no one.

> **THE ORDER THAT TENDS TO WORK**
>
> Start as a specialist, gain experience and case studies in a niche, and only then add services for that same niche. It's easier to sell a second service to a happy client than to find a new client for a service you just learned.

What changes when you stop being a freelancer

Going from freelancer to agency means changing jobs, even if you stay in the same business. Your day-to-day moves from producing to:

The three review moments

1. **Before producing.** Is the direction clear? Do we have all the real information? Reviewing the brief prevents producing in the wrong direction.
2. **Before showing the client.** Complete internal review, with a checklist. Nothing is shown that nobody has reviewed.
3. **Before publishing or delivering.** The final checklist: it works, it looks good on every device, the data is correct, the access details are in order.

Reviewing through the client's eyes

A simple and very effective technique: before sending a deliverable, review it as if you were the client seeing it for the first time, on their phone. Not as the person who made it. You'll find things that can't be seen from the inside.

AI also works as a first reviewer, with a prompt that puts it in the client's role:

REVIEW BEFORE DELIVERY — QUALITY

Act as a **type of client** who hired an agency for **service** and is seeing the deliverable for the first time. Here's the content.

Project goal: **goal**
What was promised: **scope**
Deliverable:
paste the content or the description of the deliverable

Review it and list: (1) what doesn't match what was promised, (2) spelling mistakes, doubtful data or generic phrases, (3) what a demanding client would ask to change, (4) any fact, number or quote worth verifying before delivery. Be specific, quote the exact text. Don't comment on what's fine.

Confidentiality of client data

When you work with AI, you'll paste your clients' information into external tools. It's worth having clear rules: