COURSUS.IO · EXECUTIVE EDUCATION

How to Start an AI Agency

Pre-Work Packet

Complete before your cohort begins · Estimated time: 3-4 hours

Participant Name: ____

Cohort Start Date: ______________________________________

Why This Pre-Work Exists

The How to Start an AI Agency intensive is two days of live, fast-moving content. Every minute of those two days is more valuable if you arrive having already made certain decisions.

This pre-work packet has one job: make sure you walk into Day 1 already knowing your niche, your founder model, and your baseline setup. Participants who complete it get significantly more out of the live sessions. Those who skip it spend the first half of Day 1 catching up instead of going deep.

WHAT THIS PACKET CONTAINS

Step 1 — Identify your Founder Model (< 30 minutes)

Step 2 — Choose your niche and score it (<60 minutes)

Step 3 — Draft your first Ideal Client Profile (<45 minutes)

Step 4 — Complete your baseline setup checklist (<70 minutes)

Step 5 — Submit your pre-work summary to the cohort portal (15 minutes)

Step 1: Identify Your Founder Model

Read each model carefully. One of these describes you more accurately than the others. Choose it, even if you feel your expertise cut across all four, you're advised to pick the dominant one, and this could be where you're widely known or where your expertise lies the most. This shapes how you approach the technical modules throughout the course.

Model 1: The Orchestrator

Business, sales, or management background. You sell, manage clients, and hire contractors to build (Coursus offers a wide pool of certified engineers that you can easily pick from). You are not a developer and have no intention of becoming one. You compete on account management quality, client relationships, and commercial execution and not technical depth.

Your path: Your technical modules: read for literacy, enough to brief and evaluate contractors. You do not need to build anything yourself.

Model 2: The No-Code Builder

Comfortable with technology and new software tools. You can personally build automations using Make.com, Voiceflow, Zapier, and similar platforms without writing code. You understand systems thinking.

Your path: Your technical modules: execute personally. You build client solutions using no-code tools and grow by mastering more sophisticated platforms.

Model 3: The Domain Expert Packager

Deep expertise in a specific industry such as accounting, law, healthcare, real estate, education, logistics. You are layering AI capability on top of domain knowledge that took years to build. Your niche is not chosen strategically. It is who you already are.

Your path: Your technical modules: read for literacy. You partner with or hire technical builders while you own client relationships, solution design, and domain authority.

Model 4: The Technical Builder

Software development, data science, or engineering background. You can write code, build APIs, deploy models, and architect complex systems. Your genuine gap is commercial — pricing, selling, and running the business side.

Your path: Your technical modules: execute at full depth. Your growth lever is adding commercial skills or a commercial partner.

I am Model ___ because:

My background in one sentence:

The gap I most need this course to fill:

Step 2: Choose Your Niche

The most important commercial decision you will make before your first client. Agencies that launch with a specific niche close their first client faster, charge more, and retain clients longer than those that pitch 'all AI for all businesses.'

Score each vertical from 1 (weak) to 5 (strong) on all four criteria. Your starting niche should score highest overall — ideally 4 or 5 on each criterion.

Vertical	Domain Expertise (Do you know this industry?)	Process Repetition (High-volume, automatable?)	Economic Capacity (Budget for $1.5K-$10K+?)	Pain Severity (How urgent is the problem?)
Professional Services (Law, Accounting, Consulting)				
Real Estate (Agents, Developers, Property Managers)				
E-commerce & Retail				
Fintech & Financial Services				
Healthcare & Clinics				
Education & Training				
Logistics & Supply Chain				

Agriculture & AgriTech				
Insurance				
Hospitality & Tourism				
Other: ___________________				
Other: ___________________				

HOW TO SCORE DOMAIN EXPERTISE HONESTLY

5 — You have worked in or sold to this industry for 2+ years. You know the jargon, the key players, the compliance requirements, and the day-to-day workflow.

3 — You have some exposure but significant gaps. You'd need a few weeks of research to speak credibly.

1 — You have no meaningful knowledge of this industry and would be starting from zero.

The honest score matters. Prospects in your chosen vertical will test your knowledge in the first 10 minutes of a discovery call.

My chosen vertical:

Why this vertical scores highest for me (reference your specific scores above):

The specific sub-niche I am targeting within this vertical (e.g., not just 'Real Estate' but 'Lagos residential property developers with 5-50 listings'):

Step 3: Draft Your Ideal Client Profile (ICP)

Your ICP is the specific description of your first 10 target clients. The more precise it is, the faster you find them, qualify them, and close them. Vague ICPs produce vague pipelines.

Complete every field. If you genuinely don't know an answer yet, write your best hypothesis — you will refine it on Day 1.

Field	Your Answer
Industry / Vertical	
Company Size (Annual Revenue — local currency)	
Company Size (Headcount)	
Geography (City / Country / Region)	
Decision-Maker Job Title	
Decision-Maker's Biggest Daily Pain	
What They Currently Do About It	
Why That Solution Is Failing Them	
Budget Range They Can Realistically Approve	
Where They Spend Time Online	

What They Read, Watch, or Trust	
The Trigger Event That Makes Them Ready to Buy	
Red Flags That Disqualify a Prospect	

Your Positioning Statement

Using your ICP above, draft your positioning statement. You will refine this on Day 1, but come with a first attempt, it makes the live session exercise significantly more productive.

THE FORMULA

"Unlike [competitor type], we [unique approach] so that [target client] can [specific outcome] without [common obstacle]."

Example: "Unlike generic IT agencies, we build purpose-built AI automation systems so that Lagos residential property developers can qualify 10x more leads without hiring additional sales staff."

My first-draft positioning statement:

I tested it on: ________________ (name a non-technical person). Their response:

Step 4: Complete Your Baseline Setup

These are practical actions to complete before Day 1. None of them require significant money. All of them make the live sessions immediately actionable rather than theoretical.

4A. Digital Identity

Action	Done?
LinkedIn profile updated with a professional headshot (not a selfie, not a logo)	☐ Yes
LinkedIn headline rewritten to include your target industry and the outcome you deliver (not just your job title)	☐ Yes
LinkedIn About section updated — first sentence is your positioning statement draft	☐ Yes
Personal email changed to firstname@yourdomain.com if you have a domain, or noted as a Day 1 action if not	☐ Yes
Agency name brainstormed: At least 3 options ready to share in the cohort channel	☐ Yes

4B. Tool Accounts

Create free accounts on these platforms before Day 1. You don't need paid plans yet — free tiers are sufficient for the course exercises.

Tool	Done?
Make.com — free account created (make.com)	☐ Yes
Voiceflow — free account created (voiceflow.com)	☐ Yes

HubSpot CRM — free account created (hubspot.com/crm)	☐ Yes
Loom — free account created (loom.com)	☐ Yes
Notion — free account created (notion.so)	☐ Yes
Calendly — free account created and booking link ready (calendly.com)	☐ Yes
OpenAI — account created and API access enabled (platform.openai.com)	☐ Yes
Claude.ai — account created (claude.ai)	☐ Yes

4C. Payment Infrastructure

Open at least one international payment account before Day 1. This is not theoretical — you should be able to receive an international payment by the end of the cohort.

Action	Done?
Geegpay account created and identity verification submitted (geegpay.africa)	☐ Yes
Raenest account created as backup (raenest.com)	☐ Yes
Paga account active (for PayPal-to-Nigeria payments via paga.com)	☐ Yes
Corporate naira bank account open (or Business Name registration initiated)	☐ Yes
USD domiciliary account open or application submitted	☐ Yes

4D. Research

Complete these before Day 1. They are quick and make your Day 1 niche selection exercise immediately usable.

Action	Done?
Identified 5 real businesses in your chosen niche: name, location, LinkedIn/Instagram/website	☐ Yes
Checked their Google reviews for unanswered complaints or recurring issues	☐ Yes
Checked their Instagram or Facebook DMs/comments response time	☐ Yes
Looked at their job listings on LinkedIn or Jobberman for signs of manual, repetitive work	☐ Yes
Identified the decision-maker name and LinkedIn profile for at least 2 of the 5 businesses	☐ Yes

4E. Infrastructure Check

Answer these honestly. We will address gaps during the cohort, but knowing your starting point matters.

My current internet setup (ISP + speed + backup plan):

My current power situation and any backup I have:

The biggest practical barrier I expect to face running an agency from my location:

Step 5: Submit Your Pre-Work Summary

Before your cohort start date, post the following in the #pre-work channel in the cohort Slack/WhatsApp group. This is not marked or graded, it is the starting point for your cohort peers and facilitator to know who is in the room.

WHAT TO POST IN THE COHORT CHANNEL

My name: [Your Name]

My location: [City, Country]

My Founder Model: Model [1/2/3/4] — [The Orchestrator / No-Code Builder / Domain Expert / Technical Builder]

My chosen vertical: [Your niche]

My positioning statement (first draft): [Your statement]

The one thing I most want to leave this cohort knowing how to do: [Specific answer]

QUESTIONS BEFORE DAY 1?

Post in the cohort channel. Your facilitator monitors it and responds within 24 hours on business days.

If you have a specific pre-work question that is not suited to the group channel, email: [facilitator@coursus.io]

What to Expect: Day 1 & Day 2

Day 1 Schedule

Time	Session	What You Need Ready
08:30-09:00	Cohort check-in	Pre-work submission posted. LinkedIn profile updated.
09:00-09:30	Pre-Work Debrief	Your Founder Model decision. Your chosen vertical. Positioning statement draft.
09:30-11:00	Module 01: Market Reality & Niche Selection	Your vertical scoring matrix completed (Step 2 of this packet). 5 target businesses researched (Step 4D).
11:00-11:15	Break	—
11:15-13:00	Module 02: Technical Foundation & Team Architecture	Make.com and Voiceflow accounts live. Infrastructure notes from Step 4E.
13:00-14:00	Lunch Break	—
14:00-15:30	Module 03: Legal & Financial Infrastructure	Payment accounts status from Step 4C. CAC name ideas ready.
15:30-15:45	Break	—
15:45-17:30	Module 04: Business Model & Pricing	ICP completed (Step 3). 3 business name options ready.
17:30-18:00	Day 1 Debrief & Assignment Brief	Workbook and pen/device ready for assignments.

Day 2 Schedule

Time	Session	What You Need Ready
08:30-09:00	Day 1 Assignment Review	All Day 1 cohort assignments submitted to the portal. Ready to present your positioning statement.
09:00-10:30	Module 05: Brand, Online Presence & Content Strategy	3 agency name options. Domain availability checked. LinkedIn profile updated from Day 1 debrief.
10:30-10:45	Break	—
10:45-12:30	Module 06: Systematic Client Acquisition	Warm network list of 15 contacts drafted (names and businesses). One prospect researched for a live Show-Don't-Tell demo brief.
12:30-13:30	Lunch Break	—
13:30-15:00	Module 07: Delivery Excellence & Operations	Day 1 SOP outline started. QA checklist template open and reviewed.
15:00-15:15	Break	—
15:15-16:45	Module 08: Financial Planning & Scale Strategy	P&L template open (Appendix E in Reference Guide). Startup capital estimate ready to share.
16:45-17:30	Final Presentations & Cohort Debrief	12-month financial model drafted. Year 2 strategic plan written (one paragraph minimum).
17:30-18:00	Close & Next Steps	Post-course action commitments written. First outreach message drafted and ready to send.

COME PREPARED TO PARTICIPATE

This is a live, interactive intensive, not a lecture. You will be asked to share your positioning statement with the room, react to other participants' niche choices, and complete exercises in real time. Cameras on throughout both days.

What to bring: Your completed workbook (distributed separately), this pre-work packet, a device for taking notes and accessing tools, and a reliable internet connection for both full days.

See you on Day 1.