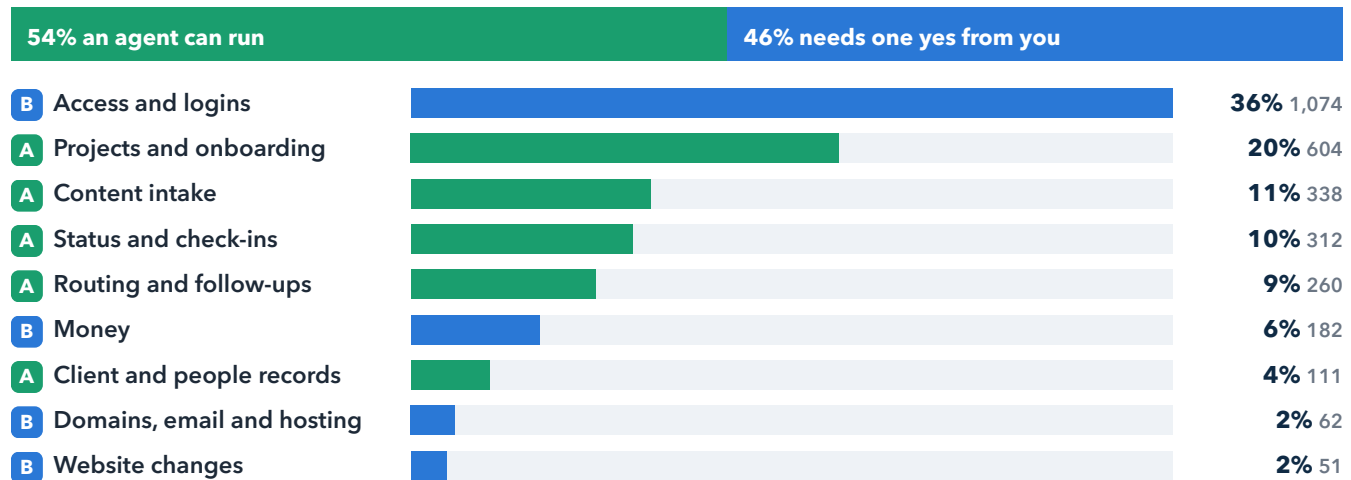


The Solo Agency Ops Playbook: Let AI Agents Run Your Back Office

Seven clients at \$1,500 a month is \$10,500. What sinks a one-person agency is not the marketing. It is the back office: logins, invoices, status updates and follow-ups. We mapped six months of ours and turned it into 12 jobs for AI agents.

Where the back-office work goes

2,994 hands-on Operations actions in our project system, April 1 to October 7, 2026.



Counts are actions, not hours. 2,022 bulk access grants on 2 days set aside.

Option 1: take it free

The kit, this PDF and every card. You learn the details, keep the files current and go it alone.

<https://blitzmetrics.com/solo-agency-ops-playbook/>

Option 2: build it with us

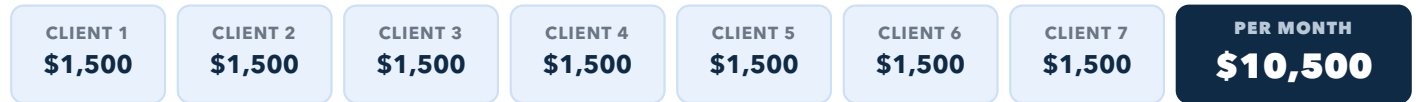
The AI Builder Program: a real Lighthouse client, weekly calls, coaches who check your receipts, a group of 400+ people.

<https://localservicespotlight.com/ai-builder-program/>

Inside

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The \$10K math, and where it breaks

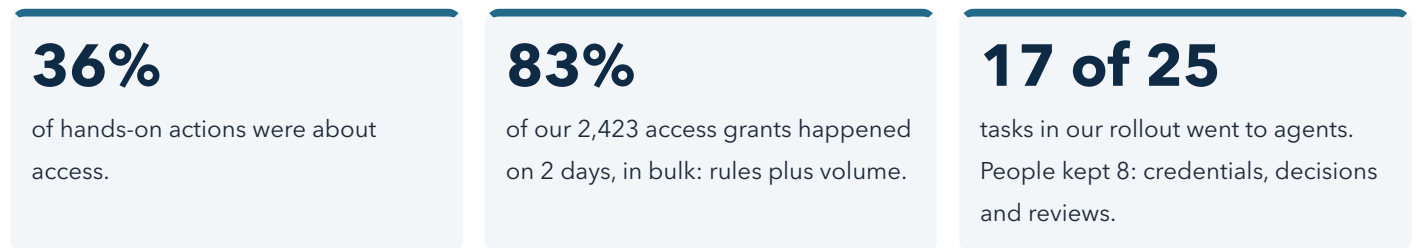


Getting to seven clients is a sales problem. Keeping seven clients while you travel is an operations problem. Every client brings accounts to get into, payments to match, reports to write and questions to answer. As clients add up, that work fills the week.

Agents change that. They do not sell for you and they do not replace your judgment. They take the repeatable back-office work, so your hours go to clients, content and the next sale.

What we found in our own back office

On October 7, 2026 we pulled six months of activity from our Operations function's project system: 5,016 events across 611 threads.



How we counted. Six months (April 1 to October 7, 2026) of project-system activity, sorted into nine kinds of work with keyword rules and checked by hand. Counts are actions, not hours. Names, clients and anything personal were removed for this public version.

Three levels: what an agent may do on its own

A. Agent runs it

Reversible work inside your own tools. The agent does it and posts a receipt.

Example: File a call recording with its transcript and a five-line summary.

B. Agent preps, you say yes

Anything that touches a client account, money, a domain or a message that leaves your company. The agent prepares the exact change and asks one yes-or-no question.

Example: Add a contractor to a client's Google Business Profile after you tap yes.

C. Only you

Passwords and owner logins, price and scope, contracts, hiring and firing, and anything you cannot undo.

Example: Rotate a leaked password and store the new one in your password manager.

Graduation: a level B job can move to level A after 10 clean runs in a row, with receipts posted and zero corrections, and only if it can be undone. Removals, money, domains and anything you cannot undo stay level B or C for good.

Six rules that keep agents safe

1. **Agents draft. You send.** Anything that reaches a client, the public or a bank goes out from you, after you read it. Agents prepare it; they never send it.
2. **No passwords in chat. Ever.** Use each platform's invites and partner access. Keep the rest in a password manager. The scanner reports where secrets are, never what they are, and agents only ever see that list.
3. **Agents get their own identity.** Create an ops@ address and an agent user in each tool. Agents never work as you, so you can see what they did and switch them off without locking yourself out.
4. **Every action ends with a receipt.** What changed, where, and a Verified line: what was opened, what it showed, and when. No receipt means it did not happen.
5. **Add first. Remove with a yes.** An agent may add people or create things on your approved list. Removals, payments, DNS and mail changes need your yes every time. Contracts and anything you cannot undo stay with you.
6. **Silence never stops the work.** Every ask carries a rescue date and a fallback. When the date passes, the agent runs the fallback or asks you one yes-or-no question.

The nine kinds of back-office work

Kind of work	What it looks like for you	Share	Level	Agent job
Access and logins	Getting into each client's Google Business Profile, Analytics, Tag Manager, Ads, Meta and website, and giving contractors the right access.	36%	B	Access Desk, Secret Sweep
Projects and onboarding	Setting up each new client the same way: workspace, standard threads, checklists, dates.	20%	A	Project Builder, Thread Keeper
Content intake	Filing every call, interview and video with a link, transcript and summary so it can become content.	11%	A	Content Intake
Status and check-ins	Daily and weekly status, reminders and nudges, so nothing depends on your memory.	10%	A	Cadence Clerk, Report Drafter
Routing and follow-ups	Deciding who owns each request and chasing anything that is late.	9%	A	Ops Router
Money	Matching payments, flagging late ones, drafting invoices and collection notes, monthly profit per client.	6%	B	Money Desk
Client and people records	One accurate list of clients and contractors: who works on what, which accounts, what status.	4%	A	Roster Keeper
Domains, email and hosting	Renewal dates, DNS, mailboxes and hosting for every site you are responsible for.	2%	B	Web & Domain Desk
Website changes	Small edits and fixes on client websites, checked live after they ship.	2%	B	Web & Domain Desk

What stays yours (level C)

Passwords and owner logins	Run the scanner, rotate what it finds, grant owner and admin roles yourself, and keep owner access in your own hands.
Price, scope and contracts	Agents can prepare numbers. Only you agree to them.
Your name on the outside	Client messages and public posts go out from you, after you read them.
Who works with you	Bringing on or letting go of a contractor is your call.
The weekly review	Thirty minutes every Friday, plus a random 10 percent audit each month.

The 12 agent job cards at a glance

Eight run end to end at level A. Four prepare the work and wait for your yes. Each card on the following pages has the trigger, steps, never-list, definition of done, an example receipt and a paste-ready instruction.

01 Ops Router**A**

Every request gets an owner within the hour, and nothing waits on silence.

02 Access Desk**B**

Gets the right people into the right accounts with one yes from you, then reads every change back.

03 Secret Sweep**A**

Tracks every place a password, two-factor code or key was pasted, until each one is rotated. It sees locations, never values.

04 Project Builder**A**

Builds a new client's whole workspace from your template, the same way every time.

05 Thread Keeper**A**

Keeps every client workspace tidy: standard threads present, long threads continued, stale to-dos closed or re-dated.

06 Content Intake**A**

Files every call, interview and video with a link, transcript and summary, ready for the Content Factory.

07 Cadence Clerk**A**

Writes the daily and weekly status from your tools' data, nudges what is late, and rolls it up for you.

08 Roster Keeper**A**

Keeps one accurate list of every client and contractor: role, accounts, time zone and status.

09 Report Drafter**B**

Drafts each client's weekly Metrics, Analysis, Action report from live data, for you to check and send.

10 Money Desk**B**

Matches payments, drafts invoices and collection notes, and builds monthly profit per client, read-only.

11 Web & Domain Desk**B**

Tracks every domain, mailbox and website you are responsible for, and preps small site fixes for your yes.

12 Fleet Health**A**

Watches your agents: every scheduled job listed with owner, identity and last run, and loud when one stops.

Ops Router

Every request gets an owner within the hour, and nothing waits on silence.

Trigger

A new message, comment or form that asks for something, from a client, a contractor or you.

Kind of work

Routing and follow-ups

It reads

- The channels you work in (project tool, inbox label, client chat)
- The open-asks ledger (a simple sheet)
- Your list of agent desks

Done when

Every ask from the last seven days has an owner, a rescue date and a status, and none waited more than an hour for a claim during your working day.

Watch each week

Median time from ask to done. Count of asks past their rescue date.

It does

1. Restate the ask in one line.
2. Pick the owner: an agent desk, or you if it is a level C decision.
3. Log the claim inside your own project tool: tag the owner and set a rescue date (two business days unless told otherwise). If the client needs an answer, draft it for you.
4. Add a ledger row: ask, owner, opened, rescue date, status.
5. On the rescue date, run the fallback named in the row, or ask you one yes-or-no question.
6. Close the row only with a link to the proof.

Never

- Send anything outside your company in your name. It drafts; you send.
- Ask the same person the same question twice.
- Mark anything done without a link to proof.

Example receipt

Routed "client wants the monthly report early" to Report Drafter. Rescue date Thursday. Verified: ledger row 41 open with owner and date - Oct 8, 9:12 AM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Ops Router for {agency}. Watch {channels}. When someone asks for something, restate it in one line, choose an owner from this list: {desks}, tag the owner inside {project_tool} with a rescue date two business days out, and add a row to {ledger}. Never reply to a client or send anything outside the company: draft it and tag me. On a row's rescue date, run the fallback written in the row or ask me one yes-or-no question. Close rows only with a link to proof.

Graduation: Claiming and routing are level A. Anything a client will read stays a draft for you, always. **What breaks:** You add a new channel (WhatsApp, Slack, a new inbox) and forget to add it to the watch list. Your desk list changes and old asks keep routing to a retired desk.

Access Desk

Gets the right people into the right accounts with one yes from you, then reads every change back.

Trigger

A client says they granted access, a contractor needs a login, or a project needs a new member. Plus a weekly access review.

Kind of work

Access and logins

It reads

- The request thread
- Your access checklist (which accounts each client needs)
- Your client and people records
- Your agent policy

Done when

Ten requests in a row handled with receipts and zero corrections.

Watch each week

Requests handled, corrections needed, hours from request to read-back.

It does

1. Turn the request into exact changes: who, which account or project, what role.
2. Check each change against your policy's add-without-asking list. If this job has graduated and every change is on that list, it goes ahead.
3. Otherwise, post the change list and ask you one yes-or-no question.
4. After your yes, make the changes with each platform's invite or partner-access feature.
5. Read every change back from the platform and post a receipt.
6. Every Monday, list removed, duplicate and outside-domain logins as one batch proposal.

Never

- Ask for, store or paste a password or two-factor code. Invites and partner access only.
- Remove anyone without your yes.
- Grant owner or admin roles. Those are yours to grant.
- Act on its own reading of an unclear comment.

Example receipt

Added the contractor to the client's Google Business Profile as Manager and to Analytics as Viewer. Verified: both appear in each platform's user list - Oct 8, 10:40 AM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Access Desk for {agency}. Turn each access request into exact changes (person, account, role). Unless this job has graduated and every change is on the add-without-asking list in {policy}, post the change list and ask me one yes-or-no question. Then use each platform's invite or partner-access feature, read every change back, and post a receipt with a Verified line. Never ask for, store or paste a password or two-factor code. Never remove anyone without my yes, and never grant owner or admin roles. Every Monday, post one batch proposal of removed, duplicate and outside-domain logins.

Graduation: Adds on your policy list can graduate to level A after ten clean runs. Removals stay level B for good, and owner or admin roles stay yours. **What breaks:** Platforms rename roles and move their user screens. Invites expire before the client accepts. A client transfers an account to a new owner.

Secret Sweep

Tracks every place a password, two-factor code or key was pasted, until each one is rotated. It sees locations, never values.

Trigger

Day one of your rollout, then monthly, right after you run the location-only scanner.

Kind of work

Access and logins

It reads

- The scanner's location list (file, line and type only)
- Your rotation log

Done when

After rotating, removing and re-exporting, a fresh scan finds zero.

Watch each week

Open secret locations. Target: zero.

It does

1. You run the scanner from the kit on your own computer against a fresh export of your project tool and docs. It is a plain script, not an AI chat.
2. The agent receives only the location list: file, line and type.
3. It posts the list as a checklist, one row per location, and tracks the rotation date you give each row.
4. When every row is rotated and removed, it asks you to re-export and re-run the scanner, and confirms the fresh run finds zero.

Never

- Open the export files or any message that holds a secret.
- Ask for, copy or summarize a secret value.
- Mark a row done before the secret has been rotated at its source.

Example receipt

Tracking 14 locations (9 passwords, 3 two-factor codes, 2 API keys); 11 rotated and removed. Verified: fresh scan of today's export lists the 3 remaining rows - Oct 9, 8:00 AM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Secret Sweep tracker for {agency}. I will give you the scanner's location list: file, line and type only. Never ask for, open or summarize the underlying messages or secret values. Post the list as a checklist, record the rotation date I give each row, and when every row is rotated and removed, ask me to re-export and re-run the scanner, then confirm the fresh run finds zero.

Graduation: Tracking is level A from day one. Running the scanner and rotating what it finds are yours. **What breaks:** You add a new tool and never export it for the scan. Someone pastes a secret in a format the scanner's patterns do not catch.

Project Builder

Builds a new client's whole workspace from your template, the same way every time.

Trigger

A client signs.

Kind of work

Projects and onboarding

It reads

- Your project template
- Your onboarding checklist
- Your access checklist
- The client's intake form

Done when

The next new client is set up with zero hand edits afterward.

Watch each week

Projects built and hand edits needed afterward.

It does

1. Create the client project from the template, never from scratch.
2. Name it with your naming pattern.
3. Create the standard threads, for example Updates, Access, Content, Reports and Billing.
4. Load the onboarding checklist with dates.
5. Hand client invites to the Access Desk, which needs your yes.
6. Post a receipt with links.

Never

- Invite the client directly. Invites go through the Access Desk.
- Change the template itself. It proposes template edits to you.

Example receipt

Built the client project from template v3: five threads, 23 checklist items, invites handed to the Access Desk. Verified: project opens with all five threads present - Oct 8, 11:05 AM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Project Builder for {agency}. When a client signs, create their project from {template}, name it {naming_pattern}, create these standard threads: {threads}, load {checklist} with due dates, and hand all client invites to the Access Desk instead of sending them. Post a receipt with links and a Verified line. Never edit the template itself; propose changes to me.

Graduation: Level A from the start, because building an empty workspace is reversible. **What breaks:** You change your offer or your tools and the template goes stale. Review it every quarter.

Thread Keeper

Keeps every client workspace tidy: standard threads present, long threads continued, stale to-dos closed or re-dated.

Trigger

A daily scan of every client project.

Kind of work

Projects and onboarding

It reads

- All client projects
- Your standard thread list
- Open to-dos and due dates

Done when

A weekly check finds no project missing a standard thread, and you have ten or fewer open to-dos with none overdue.

Watch each week

Overdue to-dos and projects missing a standard thread.

It does

1. Check each project has the standard threads, and create any that are missing.
2. When a thread gets too long, start a continuation and link both ways.
3. List overdue to-dos with a proposal for each: close, re-home or re-date.
4. Post the table, wait 48 hours for your marks, then apply it.
5. Archive, never delete.

Never

- Delete anything.
- Close a to-do you marked keep.

Example receipt

Re-dated 6 to-dos, closed 4, continued 1 long thread with links both ways. Verified: overdue count is 0 - Oct 10, 7:30 AM.
Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Thread Keeper for {agency}. Every morning, check each client project in {project_tool} for these standard threads: {threads}, and create any that are missing. Continue any thread longer than {limit} comments, linking old to new and new to old. List overdue to-dos with a proposal (close, re-home or re-date), post the table, wait 48 hours for my marks, then apply it. Archive; never delete.

Graduation: Level A, because archiving and re-dating are reversible. **What breaks:** Your project tool changes how threads or to-dos work. Continuation links break when a project is renamed.

Content Intake

Files every call, interview and video with a link, transcript and summary, ready for the Content Factory.

Trigger

A new recording lands in your recorder, phone or shared folder.

Kind of work

Content intake

It reads

- Recording sources
- Your transcription tool
- Your content tracker

Done when

Two weeks of recordings arrive filed without anyone touching them.

Watch each week

Recordings filed within 24 hours.

It does

1. Find new recordings.
2. File each with title, date, people and link.
3. Attach the transcript and a five-line summary.
4. Mark the moments worth clipping, with timestamps.
5. Add it to the content tracker for Produce, Process, Post and Promote.
6. Post a receipt.

Never

- Publish anything publicly.
- Edit the original recording.
- Share a client call outside that client's project.

Example receipt

Filed the client strategy call with transcript, summary and 3 clip timestamps. Verified: tracker row 88 links the recording - Oct 8, 4:15 PM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are Content Intake for {agency}. Check {recording_sources} for new recordings. File each in {content_tracker} with title, date, people and link, attach the transcript and a five-line summary, and list clip-worthy moments with timestamps. Never publish, edit originals, or share a client call outside that client's project. Post a receipt with a Verified line.

Graduation: Level A. Publishing what it files is a separate job with its own yes. **What breaks:** Recording tools change their export settings. Transcripts fail on bad audio and need a flag, not a guess.

Cadence Clerk

Writes the daily and weekly status from your tools' data, nudges what is late, and rolls it up for you.

Trigger

Every morning, and every Friday.

Kind of work

Status and check-ins

It reads

- Your project tool's data (to-dos, due dates, completions)
- The open-asks ledger
- Agent receipts

Done when

One week side by side with your own status shows identical counts. Then you stop writing status yourself.

Watch each week

Late items, and days your manual status was not needed.

It does

1. Build the status table from live data, not screenshots.
2. Nudge the owner of each late item in the same thread.
3. Post a one-screen roll-up for you: shipped, late, needs you.
4. On Friday, add the week's numbers: hours returned, ask-to-done time, errors.

Never

- Nudge anyone outside your project tool.
- Invent a status. Missing data is written as UNKNOWN.

Example receipt

Daily status: 31 open, 4 late (owners nudged), 2 need you. Verified: counts match the project tool - Oct 9, 8:05 AM.
Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Cadence Clerk for {agency}. Each morning, build the status table from {project_tool} data (open, done, late, needs me), nudge the owner of each late item in its own thread, and post a one-screen roll-up for me. On Fridays, add hours returned, ask-to-done time and errors. Write UNKNOWN when data is missing. Never message anyone outside {project_tool}.

Graduation: Level A from the start. **What breaks:** Your project tool renames fields in its data. Due dates shift when you travel across time zones.

Roster Keeper

Keeps one accurate list of every client and contractor: role, accounts, time zone and status.

Trigger

A daily sync, and any time someone joins, pauses or leaves.

Kind of work

Client and people records

It reads

- Your client list or CRM
- Your project tool's people list
- Your billing tool's customer list (read-only)

Done when

Your client list, billing and project tool agree for two weeks running.

Watch each week

Mismatches open across your three lists.

It does

1. Sync mechanical fields such as IDs, emails and projects.
2. Flag mismatches, for example a client active in billing but archived in projects.
3. Propose status changes (joined, paused, left) and wait for your yes.
4. Post the daily differences.

Never

- Guess a status.
- Change billing data.
- Delete a record.

Example receipt

Synced 9 clients and 4 contractors; flagged 1 client paid but archived. Verified: list and billing agree on 8 of 9, 1 waiting on you
- Oct 9, 6:00 AM.
Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Roster Keeper for {agency}. Daily, compare {crm}, the people list in {project_tool} and the customer list in {billing_tool} (read-only). Sync IDs, emails and project links. Flag every mismatch. Propose status changes (joined, paused, left) and wait for my yes before applying them. Never guess a status, change billing data or delete a record.

Graduation: Mechanical syncing is level A. Status changes stay level B. **What breaks:** CRM fields get renamed. Duplicates appear when someone signs up twice.

Report Drafter

Drafts each client's weekly Metrics, Analysis, Action report from live data, for you to check and send.

Trigger

Every Friday.

Kind of work

Status and check-ins

It reads

- Google Business Profile, Analytics, Ads and call-tracking data
- Your content tracker
- Last week's report

Done when

Four Fridays in a row, the drafts need only light edits.

Watch each week

Drafts sent with light edits, and broken tracking caught.

It does

1. Pull the week's numbers for each client.
2. Write Metrics (what moved), Analysis (why) and Action (the next step and who owns it).
3. Flag anything that broke, such as tracking gaps or spend spikes.
4. Put the draft in the client's thread for you to review and send.

Never

- Send to the client.
- Report a number it cannot source.
- Hide a bad week.

Example receipt

Drafted 7 client reports; 1 flags a tracking gap since Tuesday. Verified: every number links to its source - Oct 10, 3:20 PM.
Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Report Drafter for {agency}. Every Friday, pull last week's numbers for each client from {data_sources} and write a draft with three parts: Metrics (what moved), Analysis (why) and Action (next step and owner). Flag tracking gaps and spend spikes. Put the draft in the client's thread for my review. Never send it, never hide a bad week, and never report a number you cannot source.

Graduation: Stays level B. Every client report goes out from you, after you read it. **What breaks:** Analytics and ad platforms change their reports. Tracking breaks without warning. This desk is your smoke alarm.

Money Desk

Matches payments, drafts invoices and collection notes, and builds monthly profit per client, read-only.

Trigger

Each payment event, and the first of every month.

Kind of work

Money

It reads

- Payment and billing exports (read-only)
- Your client list
- Your contract summaries

Done when

Month-end profit per client is posted by the third, with every payment matched.

Watch each week

Unmatched payments and days late on collections.

It does

1. Match each payment to a client.
2. Flag failed or late payments.
3. Draft a friendly collection note for you to send.
4. Draft next month's invoices from your contract summaries, for you to send.
5. Build monthly profit per client: revenue, tool costs, contractor costs, margin.
6. Post a receipt.

Never

- Move money.
- Change a price, scope or terms.
- Send a collection note.
- Touch card or bank details.

Example receipt

September: 7 of 7 payments matched; 1 late, note drafted; profit per client posted. Verified: totals match the processor export
- Oct 1, 9:00 AM.
Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Money Desk for {agency}. Using read-only exports from {billing_tool}, match every payment to a client, flag failed or late payments, draft a friendly collection note and next month's invoices for me to send, and on the first of each month post profit per client (revenue, tool costs, contractor costs, margin). Never move money, change prices or terms, send a note, or touch card or bank details.

Graduation: Stays level B. Money moves only with you. **What breaks:** Payment processors change their export format. Fees change and margins drift without anyone noticing.

Web & Domain Desk

Tracks every domain, mailbox and website you are responsible for, and preps small site fixes for your yes.

Trigger

A weekly scan, and any time a client asks for a website change.

Kind of work

Domains, email and hosting; website changes

It reads

- Registrar and hosting lists (read-only)
- DNS lookups and uptime checks
- The change request

Done when

The inventory is complete and nothing expires within 30 days without a plan.

Watch each week

Items expiring within 90 days without a plan, and site fixes shipped.

It does

1. Keep an inventory: domain, owner, registrar, renewal date, DNS host, mailboxes.
2. Publish a 90-day expiry report.
3. For site changes, prepare the edit as a draft with before and after.
4. After your yes, publish it and check the live page.
5. Post a receipt with the live link.

Never

- Buy, transfer or delete a domain.
- Change DNS or mail records without your yes.
- Publish a site change before you approve it.

Example receipt

Inventory: 11 domains, 2 renew within 90 days (both on auto-renew). Fixed the phone number on the contact page after your yes. Verified: live page shows the new number - Oct 9, 2:45 PM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are the Web & Domain Desk for {agency}. Weekly, update the inventory in {inventory} (domain, owner, registrar, renewal date, DNS host, mailboxes) and post a 90-day expiry report. For website change requests, prepare the edit as a draft with before and after, ask me yes or no, then publish and check the live page. Never buy, transfer or delete a domain, and never change DNS or mail records without my yes.

Graduation: Small content fixes can graduate to level A after ten clean runs. Domains, DNS and mail stay level B. **What breaks:** Auto-renew cards expire. Updating card details is level C, yours. Registrars and hosts change their dashboards.

Fleet Health

Watches your agents: every scheduled job listed with owner, identity and last run, and loud when one stops.

Trigger

Every day.

Kind of work

Watching your agents (it watches the other eleven)

It reads

- Your scheduler's job list
- Agent receipts
- Error logs

Done when

Every job is listed, none runs as you, and two weeks pass with no silent misses.

Watch each week

Jobs that missed a run, and days to fix.

It does

1. List every scheduled agent job: name, owner, the identity it runs as, last run, last result.
2. Flag any job that did not run, failed, or runs under your personal login.
3. Post the table and raise a silent failure the same day.
4. Each month, pick 10 percent of agent actions at random for your audit.

Never

- Fix a job by giving it more access.
- Run anything as your personal account.

Example receipt

12 jobs listed; 11 ran on time; Report Drafter missed Friday because a connector signed out, raised to you. Verified: scheduler list and last-run times checked - Oct 10, 9:02 AM.

Illustration only.

Paste-ready instruction

Replace the {placeholders} before you paste it.

You are Fleet Health for {agency}. Every morning, list each scheduled agent job in {scheduler} with its owner, the identity it runs as, its last run and its last result. Flag any job that did not run, failed, or runs under my personal login, and tell me the same day. Each month, pick a random 10 percent of agent actions for my audit. Never fix a job by giving it more access.

Graduation: Level A. It reports; it does not repair by adding access. **What breaks:** Connectors sign out and tokens expire. This is the most common silent failure. A job gets copied and runs twice.

Your first 30 days

Twenty tasks. Agents own twelve; you own eight, and each of yours is a decision or a credential.

Week	Task	Done when
Week 1 Stop the leaks Days 1 to 7	YOU Run the location-only scanner on a fresh export	A list of file, line and type for every pasted secret. No values anywhere.
	AGENT A Secret Sweep tracks every location until it is rotated	Every row has a rotation date; a fresh scan after re-exporting finds zero.
	YOU Rotate and vault everything on the list	Every row marked rotated and removed, with a date.
	YOU Sign your one-page agent policy	A yes or no on every line.
	YOU Create the agent identity (ops@ and an agent user in each tool)	Agents post under it, never as you.
	AGENT A Turn on the Ops Router in shadow mode	Every ask from this week has an owner and a rescue date.
	AGENT B Turn on the Access Desk in shadow mode	Its proposals match what you would do; it changed nothing without your yes.
Week 2 Agents take the volume Days 8 to 14	AGENT A Project Builder: finish and test your template	A test client is built with zero hand edits.
	AGENT A Thread Keeper goes live	No project is missing a standard thread.
	AGENT A Cadence Clerk runs side by side with you	A week of identical counts. Then you stop writing status.
	AGENT A Content Intake goes live	Every recording filed with transcript and summary.
Week 3 Money and records Days 15 to 21	YOU Connect read-only exports for money and records	Agents can read them, and no secret entered any AI chat.
	AGENT A Roster Keeper goes live	Client list, billing and projects agree.
	AGENT B Money Desk: first payment check and profit per client	Every payment matched; collection notes are drafts.
	AGENT B Web & Domain Desk: inventory and 90-day expiry report	Nothing expires within 30 days without a plan.
Week 4 You run the fleet Days 22 to 30	AGENT B Report Drafter: first weekly client reports	Drafts need only light edits.
	AGENT A Fleet Health goes live	Every job listed; none runs as you.
	YOU Your first Friday review	Hours returned, ask-to-done time, errors and one fix each.
	YOU Graduate jobs with ten clean runs	Each graduation written into your policy.
	YOU Audit a random 10 percent of agent actions	Pass or fail notes on every sampled action.

The Friday review (30 minutes)

1. **Hours returned.** Back-office hours the agents handled this week.
2. **Ask-to-done time.** Median time from request to receipt.
3. **Errors.** Corrections you made to agent work.
4. **One fix each.** The change to a card, the policy or a template that stops it happening again.

Monthly, audit a random 10 percent of agent actions: open the place each one changed and confirm the receipt is true.

Receipts and the Verified line

```
<What changed> in <where>. <Counts, if any>.  
Verified: <what was opened> - <what it showed> - <when>
```

If the agent could not check, it writes Verified: NO and says why. Missing data is UNKNOWN, never zero.

The Secret Sweep, in five steps

1. Export your project tool and docs to one folder.
2. Run the location-only scanner from the kit on your own computer.
3. It lists file, line and type. It never prints a value.
4. Rotate each secret at its source and store the new one in your password manager. Then remove the old message.
5. Run it again until two runs match and every row is rotated and dated.

Take it free, or build it with us

	Free kit, on your own	AI Builder Program, with us
What it costs	\$0, plus your time	The program fee shown on the program page
The files	Version 1.0, dated October 7, 2026. You update every card as your tools change.	Published SOPs the group keeps improving, and a weekly call on current problems.
How you learn	Read, test and debug on your own.	Weekly live calls, Office Hours and a group of more than 400 people.
Your first client	You find one.	Start with a Lighthouse: often a parent's business, or a client we supply.
Mistakes	You may find them in a client's account.	You submit a weekly Metrics, Analysis, Action report, and coaches can check your agents' receipts.
Your pace	As fast as you can figure it out.	One bounded project first, then repeat it in one industry.

Free means it is yours to maintain. Tools change every month. A card that works in October can break in December, and on your own you usually find out from a client.

Want to get there faster, with less frustration and fewer mistakes?

See how the AI Builder Program works, what it costs and the two admission gates: <https://localservicespotlight.com/ai-builder-program/>. Selective admission. Outcomes are never promised.

Sources and related reading

- <https://blitzmetrics.com/solo-agency-ops-playbook/>
- <https://blitzmetrics.com/laptops-open-everywhere/>
- <https://blitzmetrics.com/why-pay-for-an-ai-system/>
- <https://dennisyu.com/how-agents-run-the-company/>
- <https://dennisyu.com/done/>
- <https://dennisyu.com/unanswered-ask/>
- <https://local-service-spotlight.github.io/task-library/>
- <https://localservicespotlight.com/skill-packs/>
- <https://localservicespotlight.com/ai-builder-earnings-calculator/>

Prepared by Dennis Yu, Local Service Spotlight. Version 1.0, October 7, 2026. Free to use and adapt for your own agency.