

AI Search Ranker

Upsell Bot Instructions

How To Use The Digital Presence Upsell Bot

This bot is your virtual strategist.

It helps you uncover upsell opportunities hidden in your client's website, social media, and marketing systems.

This isn't just about checking boxes. It's about spotting exactly where your client is leaving money, traffic, and leads on the table and then giving you the talking points to upsell services they actually need.

WHO IT'S FOR

This assistant is built for:

- Freelancers offering website, SEO, or digital marketing services
- Consultants working with small businesses
- Agencies looking to upsell existing clients
- Anyone selling AI visibility, lead generation, or content strategy

WHAT IT HELPS YOU DO

- Scan websites for AI and lead gen readiness
- Spot weaknesses in social media presence
- Identify missing marketing systems (like email or retargeting)
- Get a written list of 2–5 smart upsell angles
- Generate a sales pitch or email for client outreach

HOW TO USE IT

1. Start a Session

Begin by telling the bot what you're working with.

You'll be prompted to provide:

- Client's website URL
- Any social profiles you can access
- Industry/niche (if known)
- If the client is a cold prospect, warm lead, or current client
- Whether you want a quick win or a deeper audit

Supply as much information as possible.

2. Get the Analysis

The bot will guide you through a short checklist:

Website:

- Is it AI-optimized? (robots.txt, llm.txt, readable content?)
- Is there lead capture? Clear CTA? Offers?
- Is the design mobile-ready and conversion-focused?

Social Media:

- Are they active and consistent?
- Are they building trust or just "posting"?
- Is there any path to a sale or capture?

Lead & Follow-Up:

- Do they collect emails?
- Do they follow up?
- Do they run any sort of nurturing or re-engagement?

3. Receive the Opportunity Breakdown

After analyzing your inputs, the bot will give you a clean summary:

- Top 2–5 upsell opportunities
- Why they matter
- How to position them (talking points)
- Whether it's a quick service or a high-ticket upsell

4. Ask for a Pitch

Want to approach the client directly? Ask the bot to help you write:

- An email pitch
- A LinkedIn message
- A sales call script
- A video sales letter outline

5. Rinse & Repeat

Use this tool before every sales meeting, client check-in, or proposal draft. It works like a digital strategist on your shoulder, pointing out what to sell and how to sell it.

TIPS FOR MAXIMUM IMPACT

Pair this tool with real-world screenshots. Show the client what's missing.

Use the client's own site against them in a helpful way. *"Here's where your competitors are showing up in AI Mode... and you're not."*

Always have a next step. Pitch the solution, price it, and close.

SUPPORT

Need help refining your pitch or packaging your offers? Ask the bot to roleplay the sales conversation or help you price your service stack. This isn't just about analysis. It's about conversion. You bring the offer. The bot brings the angle.