

• TOOLS • MARGIN • THE LEAN STACK

The Agency Tool Stack

You do not have a tool problem. You have a **too-many-tools** problem. You are paying for **11 logins** and using maybe four. This is the buy-this-not-that field guide: run your entire agency on 7 tools for \$59 a month, the upgrade path we use past \$40K/month, and the exact list of software to never buy yet.

The one-page stack map

The under-\$97 starter stack

The \$40K/mo grown-up stack

The "do not buy yet" list

The consolidation rule

The 30-minute setup

THE REAL PROBLEM

Your software bill is bigger than your rent. And it is not making you a dollar.

You signed up for GoHighLevel at \$297 a month and use about 10 percent of it. You bought the tool the last guru swore by, and it sits there unused next to the four before it. You spend more time switching tabs than doing the actual client work. None of that is a tooling gap. It is a discipline gap, and it is quietly eating the thin margin you have left.

1,200

app switches a day for the average knowledge worker

Harvard Business Review, Aug 2022 (137 users, 3 Fortune 500 firms)

~4 hrs

per week lost just reorienting after those switches, about 9% of the work week

Harvard Business Review, Aug 2022

106

SaaS apps the average company ran in 2024, and most go half-used

BetterCloud, 2025 State of SaaS report

Every dollar of unused software is a dollar of margin you already keep too little of. The average agency keeps 13 cents on the dollar. The tool bill comes straight off that.

READ THIS BEFORE YOU BUY ANYTHING ELSE

The fix is not the next tool. It is the smallest stack that runs the whole agency, end to end, so a lead never falls through a crack and you never pay for a login twice. This guide hands you that stack on one page, with the free start, the pro pick, the exact price, and the moment you are actually allowed to upgrade. **Build it in an afternoon. Then go get clients.**

THE STACK MAP

Seven jobs. Seven tools. No twelfth subscription.

An agency has exactly seven jobs that need software. That is it. Here is every job, the free way to start, the pro pick with the real price, and the signal that tells you it is time to upgrade. Run the whole thing before you read another word.

THE JOB	THE \$0 START	THE PRO PICK + PRICE	WHEN TO UPGRADE
CRM Track every lead	HubSpot Free 2 users, 1,000 contacts	GoHighLevel Unlimited \$297/mo	When the inbox loses leads
Outreach Send cold email	Smartlead Basic \$39/mo	Smartlead Pro \$94/mo	Past ~3 inboxes sending
Scheduling Book the call	Calendly Free 1 event type	Calendly Standard \$10/seat	Need round-robin or reminders
Payments Get paid	Stripe \$0 fixed	Stripe 2.9% + \$0.30/charge	Never. Stripe scales with you
Projects Run delivery	ClickUp Free unlimited users	ClickUp Unlimited \$7/user/mo	When you hit storage limits
Reporting Prove the ROI	Looker Studio \$0	AgencyAnalytics from \$59/mo	When clients want a portal
AI Move faster	ChatGPT / Claude Pro \$20/mo	Claude / ChatGPT Team \$30/user	When the team needs shared access
The whole machine, on the free tier			\$59/mo fixed

Prices are publisher list prices as of 2025–2026 and may change: HubSpot, Smartlead, Calendly, ClickUp, AgencyAnalytics, OpenAI, Anthropic official pricing pages. GoHighLevel Unlimited \$297/mo and Stripe 2.9% + \$0.30 per online transaction confirmed against published pricing.

How to read this page

Start in the **\$0 Start** column and run there until the **When To Upgrade** trigger actually fires. Not when a guru tells you to. Not when you feel behind. When the trigger fires. The next two pages show you the exact receipt for the free stack and the exact upgrade path once the money is real.

THE RECEIPT

Run the entire agency for **\$59 a month**. Here is every line item.

No estimates. No "starting from." This is the real bill for a stack that takes a lead from cold email to signed and paid, with reporting on top. The only variable line is Stripe, which charges nothing fixed and only takes a cut when money actually moves.

The Under-\$97 Starter Stack	
SOLO TO 2-PERSON AGENCY · \$0-10K/MO	
HubSpot Free CRM · 2 users, 1,000 contacts	\$0
Smartlead Basic Cold outreach · warm-up included	\$39
Calendly Free Scheduling · 1 event type	\$0
Stripe Payments · 2.9% + \$0.30/charge	\$0
ClickUp Free Project mgmt · unlimited users	\$0
Looker Studio Client reporting · unlimited dashboards	\$0
ChatGPT Plus or Claude Pro AI copilot · 1 seat	\$20
Total fixed cost Plus Stripe %, only when you get paid	\$59/mo

Why these seven

Every one has a real free or near-free tier that does the job at your stage. **HubSpot Free** beats paying for Pipedrive. **Looker Studio** beats any paid dashboard. **Stripe** has no monthly fee, so you only pay when a client pays you. Nothing here is a trial that expires.

The "Sheet + Calendly + prayer" trap

If your whole business is a Google Sheet, a Calendly link, and hope, you are not behind. You are close. **Swap the Sheet for HubSpot Free and add Smartlead, and you have a real pipeline for \$39 a month.** That is the entire difference between feast-or-famine and a system.

THE HONEST MATH

One retainer client is worth **\$5,000 to \$25,000 a month** (Stackmatix, 2025). Your entire tool stack costs **\$59**. If this stack helps you close one client, it pays for itself for the next **seven years**. Stop optimizing the \$59. Go close the \$5,000.

THE "GROWN-UP" STACK · ~\$40K/MO

When the money is real, **consolidate. Do not collect.**

At scale the goal flips. The free stack was about spending nothing. The grown-up stack is about killing logins. The single biggest move is GoHighLevel Unlimited, which replaces your CRM, scheduling, email, and funnel builder in one bill, so you stop reconciling four tools that do not talk to each other.

GHL

GoHighLevel Unlimited

\$297/mo

The consolidation play. **Replaces CRM + scheduling + email + funnels in one login.** This is the upgrade that kills four separate subscriptions and the tab-switching between them. Worth it only once you have the clients to fill it.

SL

Smartlead Pro

\$94/mo

Step up from Basic when you are running multiple sending inboxes and need the higher send volume, rotation, and detailed deliverability reporting to keep landing in the primary tab.

CAL

Calendly Standard

\$10/seat

Only if you stay off GoHighLevel's built-in calendar. Adds round-robin routing and automated reminders, which directly cut no-shows on cold-booked calls.

\$

Stripe

2.9% + \$0.30

Still the same. **No monthly fee, ever.** It scales with revenue instead of charging you a flat tax, which is exactly why it never leaves the stack.

CU

ClickUp Unlimited

\$7/user/mo

Annual billing. The moment you have a team and real storage needs, this is the cheapest way to keep delivery from living in your head and your DMs.

AA

AgencyAnalytics

from \$59/mo

A branded client portal that proves ROI on autopilot. The upgrade trigger is simple: when clients start asking "what am I paying for," a portal earns its price in one saved account.

AI

Claude or ChatGPT Team

\$30/user

Shared workspace and higher limits for the whole team. Upgrade from individual Pro seats only when more than one person needs the AI in their daily workflow.

Total fixed cost

GHL \$297 + Smartlead \$94 + Calendly \$10 + ClickUp \$7 + AgencyAnalytics \$59 + AI \$30, plus Stripe %

~\$497/mo

Still less than the **\$600+** the same owner pays running the disorganized FOMO pile, except now it is six tools that talk to each other instead of a dozen that do not. Add seats and clients on top; the fixed base barely moves.

GoHighLevel Unlimited \$297/mo, Starter \$97/mo, Agency Pro (SaaS Mode) \$497/mo: GoHighLevel official pricing, 2025–2026. Other prices: publisher list prices, 2025–2026. Reminders and confirmations are a strong correlation with lower no-shows, not a guarantee.

THE "DO NOT BUY YET" LIST

The most valuable page in this guide is the one telling you to keep your money.

These are the tools agency owners buy too early, every time. Each one has a free or cheaper alternative that does the job until you genuinely outgrow it. Names and prices, so there is no confusion.

**GoHighLevel SaaS Pro****Skip \$497/mo**

The \$497 plan exists to resell software under your own brand. **Do not buy it until you actually have clients paying you for software. Use GoHighLevel Unlimited at \$297 first**, or stay free until the leads outgrow your inbox.

**Paid dashboards like Databox****Skip \$159/mo**

Databox dropped its free tier in July 2025 and now starts around \$159/mo. **You do not need it. Looker Studio is free and builds the same client dashboards**, connected to the same data sources.

**DocuSign or PandaDoc Business****Skip \$40-49**

DocuSign runs about \$40/user and PandaDoc Business about \$49. At your volume that is pure waste. **PandaDoc Free handles 5 signed docs a month**, which covers most agencies closing under ten clients a month.

**Pipedrive or paid CRMs****Skip \$14-79/user**

Pipedrive has no free plan and runs \$14 to \$79 per user. **You are paying to track leads you could track for free. HubSpot Free covers 1,000 contacts and 2 users**, which is more pipeline than most agencies have.

**ZoomInfo or Apollo enrichment****Skip until converting**

Buying more data does not fix outreach that does not convert. **Do not pay for enrichment until your current list is already booking calls. Prove the message works on free data first**, then pay to pour fuel on a fire that is already lit.

Every one of these is a tool you will be sold by someone who profits from the sale. **The filter is the same every time: does the cheaper version still do the job at your current stage? If yes, you are not allowed to upgrade yet.**

THE CONSOLIDATION RULE

The one question that ends tool FOMO for good.

You do not need a rule for every tool. You need one filter you run before every purchase. Tape it above your desk.

RUN THIS BEFORE EVERY SUBSCRIPTION

"Before I buy a fourth tool,
can the three I already pay for do this?"

Most of the time the answer is yes, and you just saved yourself another login, another bill, and 40 more app switches a day. The rest of the time, run the audit below. The first two rows are filled in as examples. List every subscription, apply the three rules, and act before the next renewal.

Untouched 30 days

→ cancel today

Used under 25%

→ downgrade a tier

Two tools, one job

→ pick one this week

The Quarterly Tool Audit

RUN EVERY 90 DAYS

SUBSCRIPTION	\$ / MONTH	USED IN LAST 30 DAYS? → VERDICT
Databox	\$159	☒ No → cancel
GoHighLevel	\$297	☒ Yes, at 10% → downgrade
		☐ No → cancel
		☐ No → cancel
		☐ No → cancel
		☐ No → cancel

Monthly waste flagged

\$ _____ × 12 = \$ _____ /yr you just gave yourself

The toggle tax is real money

Companies leave an average of **\$18 million in wasted SaaS spend on the table a year** (Zylo, 2024). You are not a Fortune 500, but the same waste scales down to your two-person shop. The two example rows alone flag **\$456 a month** of waste in tools to cancel or downgrade. At a 13-cent margin, killing that is the same as **winning roughly \$42,000 a year** in new revenue. The audit is how you stop paying that tax.

THE 30-MINUTE SETUP

Build the whole stack **before your coffee goes cold.**

No multi-week migration. No consultant. Six steps, in order, that take a fresh agency from nothing to a working pipeline. Do them top to bottom and you are live today.

STEP

1

Connect Stripe

5 min

In Stripe, click **Products** → **Add product**. For a retainer set price type to **Recurring, monthly**; for a one-off setup fee use **One-time**. Hit **Create payment link** and you get a URL you can text the second someone says yes – no invoice, no lost moment.

STEP

2

Import contacts to HubSpot Free

5 min

Export your Sheet to CSV. In HubSpot: **Contacts** → **Import** → **File from computer**. Map columns to **First name, Email, Phone, Company, Lead status**. Set every row's Lead status to **New** on import, so your pipeline starts clean and nothing hides in your inbox.

STEP

3

Build one Calendly event

5 min

Connect Google or Outlook, then create an event with these exact settings: name **"Discovery Call,"** duration **30 min**, buffer **15 min after**, daily cap **4**, and notifications set to **1 confirmation + 1 reminder (24 hrs before)**. Paste the link in your email signature and every cold reply.

STEP

4

Build one ClickUp client template

7 min

Make a List, add these 8 tasks, then **save as Template** and duplicate per client: **1. Kickoff call booked** · **2. Access requests sent (ad accounts, GA4, domain)** · **3. Brand assets received** · **4. Strategy doc drafted** · **5. Campaign built** · **6. Client approval** · **7. Launch** · **8. Week-1 report sent**.

STEP

5

Copy one Looker Studio template

5 min

Open the Looker Studio gallery, pick the free **"Google Ads Overview"** template (or "GA4 Acquisition" for organic), hit **Use my own data**, and attach the **Google Ads** or **Google Analytics** connector for that client. Reporting is now a shared link, not a half-day of screenshots.

STEP

6

Warm up Smartlead, then send

3 min

Connect your sending inbox, toggle **Warmup ON**, and set ramp to **~40 emails/day climbing to 40-50**. Let it run **14 days** before any real volume. **This is the one step you do not rush**, because a burned domain takes months to recover.

THE PROOF

The tool is not the bottleneck. It never was.

Owners who chase tools believe the next subscription is the thing that finally makes them organized. The data says the opposite. The expensive problem is not what you lack. It is what you waste.

13¢

Kept per revenue dollar at the average agency

Margin is thin. Every unused subscription comes straight off it. Industry benchmark, 2025.

~9%

Of the work week lost to app-switching

About 4 hours a week reorienting between tools. Harvard Business Review, Aug 2022.

\$59

Full fixed cost of a stack that runs the agency

Versus the \$297 plan you use 10% of. This guide, free tiers, 2025–2026.

106 SaaS apps the average company ran in 2024, down from 112 the year before. Consolidation is the trend at every size, because more tools never meant more output. It meant more bills and more tabs. BetterCloud, 2025 State of SaaS report

\$18M average **wasted SaaS spend left on the table per company per year**, up 7% from 2022. The waste is not exotic. It is forgotten logins and overlapping tools, the exact thing the consolidation rule kills. Zylo, 2024 SaaS Management Index (30M+ licenses, \$34B+ spend)

\$5-25K

the monthly value of **a single retainer client**. Set against a \$59 stack, the lesson is blunt: the leverage was never in the software. It is in closing the client and keeping them.

Stackmatix, B2B Marketing Agency Pricing, 2025

READ IT ONE MORE TIME

You can keep buying the tool the next guru swears by and wonder why your software bill grows while your bank account does not. Or you can run the seven-tool stack for **\$59 a month**, run the consolidation rule before every purchase, and put the saved money and the saved hours where they actually pay: **getting clients and keeping them**. The tool was never the machine. The system is.

• YOUR NEXT MOVE

The stack is the easy part. The machine that fills it is the hard part.

Now you can run your whole agency for \$59 a month. But a clean stack with no clients in it is just tidy software. The hard part, the part the tools cannot do for you, is the predictable flow of booked calls that show, close, and stay. That is the chain we build and run **with you**: booked calls that show up, a discovery that closes, and clients who renew, all backed by the \$10,000 guarantee.

Every month you spend tweaking tools instead of filling the pipeline is a month closer to another dead month. **Apply to AgencyGod now.** We onboard only a handful of agencies a month, and every spot comes with the \$10,000 guarantee.

\$10K
GTD

You get the result or you get paid \$10,000

Apply to AgencyGod →

Free 30-min strategy call · limited monthly intake

agencygod.com

Results mentioned are real client outcomes and are not typical. Individual results vary with effort, market, and execution. The \$10,000 guarantee is real and subject to the program's written enrollment agreement terms.