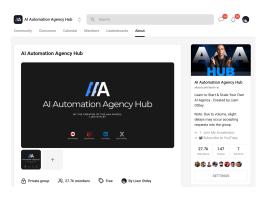


6-Month AI Automation Agency Roadmap 🌋

CREATE YOUR OWN COPY: File Make a Copy (top left corner)

Free Resource by Liam Ottley



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Introduction ******



You've made the decision to start your Al Automation Agency (AAA) journey - congratulations. This comprehensive roadmap is designed to take you from complete beginner to landing your first paying clients in just 6 months.

Whether you're transitioning from a traditional career or starting your first business venture, this step-by-step guide will provide you with the exact blueprint you need to succeed. No fluff, no theory just practical steps that work.

It's the exact process I used to scale Morningside AI to over \$100,000 per month, and the same process that thousands of successful AAA owners in our community have followed.

Watch the Video



Watch Here



Overview

In this roadmap, we'll cover:

1. Phase 1 - Learn (Months 1-2):

- Master the foundational AAA skills
- Complete the free course curriculum
- Build your technical confidence

2. Phase 2 - Apply (Months 3-4):

- Get real-world experience
- o Build your first AI solutions
- Work with practice clients

3. Phase 3 - Monetize (Months 5-6):

- Land your first paying clients
- Set up your business properly
- Start scaling your agency

How to Use This Roadmap (X)



This document is designed to be your constant companion over the next 6 months. It contains:

- Detailed checklists for each phase
- Templates for tracking your progress
- Space for personal notes and reflections
- Links to all necessary resources

Make a copy of this document and treat it as your personal workbook. Check off items as you complete them, take detailed notes, and regularly reflect on your progress.

A Note From Me



On a personal note, I'm so excited for you to get started on this journey.

This business model has completely changed my life, and I've seen first hand how it has done the same for thousands of others.

I've put so much work into this resource. I can't do much more to help you.

The ball is now in your court.

How bad do you really want it?

Liam 💪





PHASE 1: LEARN

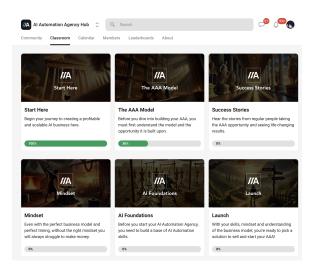


Months 1-2: Build Your Skills 📚



During these first two months, your only focus is on **completing the free course** in the <u>Skool</u> community. This will provide you with the foundational understanding and skills needed to start your Al Automation Agency.

I have done all the hard work for you here by ordering my content so you can build your knowledge up **gradually** and grasp the key concepts. If you have any questions, post them in the Skool to start a discussion or **ask me directly** on my weekly Q&As (see 'Calendar' tab inside Skool).



Click Here to Join for Free



Watch My Free AAA Course 👰

@ GOAL: Complete the entire course and make notes along the way. Follow each of the tutorials to completion so you start building your portfolio. REASONING: This will be your base of understanding from which you start your AAA journey on. ■ Start Here: This module introduces you to the free course and community so you can get the most out of it ☐ The AAA Model: Understanding the model and the opportunity it's built upon is crucial before diving into building your AAA. **Notes** Add your notes here! Success Stories: These stories will inspire you and show you what's possible with the AAA opportunity. **Notes** Add your notes here! ☐ Mindset: The right mindset is essential for success, even with the perfect business model and timing. **Notes** Add your notes here! ☐ Al Foundations: Building a base of Al Automation skills is necessary before starting your AAA. **Notes** Add your notes here!



	Launch: This module prepares you to pick a solution to sell and start your AAA.
Notes	
•	Add your notes here!
Notes	Marketing: Learn how to get clients for your Al Automation services, which can be challenging for beginners.
•	Add your notes here!
Notes	Operations: Understand how to optimize your sales process, onboard clients, and manage project deliveries.
•	Add your notes here!
Refle	ect on Your Learnings 💭
	at you've completed the course, you've gained a lot of knowledge about how to start an Al ation Agency and how to build Al solutions.
Before	you move on to phase two, it's important to reflect on the progress you've made so far.
1. 2.	Look over your notes from the course and write down your 10 most important takeaways/learnings: {key takeaway 1}: {explanation} {key takeaway 2}: {explanation}



PHASE 2: APPLY



Months 3-4: Get Experience with Free Clients

Now it's time to apply what you've learned and gain **real-world experience**. Focus on learning, not earning. Getting them around the wrong way will be the death of your agency.

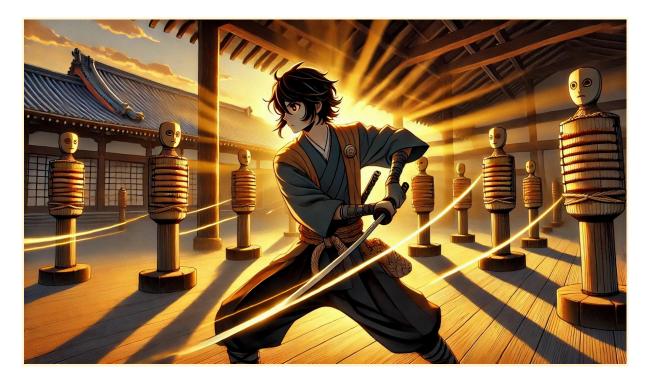
You have no experience therefore you have **little to no value**. Experience in creating value with AI is far more valuable than money at this stage, as only through experience can you eventually be valuable enough to charge thousands of dollars per project!

GOAL: Get your first few 'successful deliveries' under your belt. These can be projects done for yourself, your friends, family, colleagues, boss or people in our community who have something you can help on.

REASONING: If you can't get it right with a free client where the stakes are low, you have no chance of successfully delivering a paid project. Baby steps.

In this section we will cover **3 ways** to start building experience & momentum:

- 1. Building Personal Projects 👤
- 2. Utilizing the Skool Community 🤝
- 3. Creating a Warm Outreach System 📤
- 4. Tracking Your Free Client Work





Building Personal Projects

The easiest place to start to apply the skills you learned in phase one is to identify opportunities to build AI tools for yourself!

This is the lowest pressure environment possible for you to start getting out of the classroom and into the real world with your Al automation skills.

Examples of Personal Projects:

- You want to start making content so you try to build your own HeyGen avatar and use it to build a system which can create reels for you.
- You want to get ideas for YouTube videos so you create a system that can take in a channel URL (e.g. my channel), pulls all the comments and then analyzes them for potential video ideas. <u>Tutorial</u>.
- You hear about a community member creating an AI cold caller so you find a tutorial on YouTube and create your own one to prank call your family.
- ☐ Write 10 ideas below: Pick your 3 favorites and build them out fully.
- 1. {idea 1}
- 2. {idea 2}

NOTE: If you haven't watched the course, you won't have any idea what you can build!

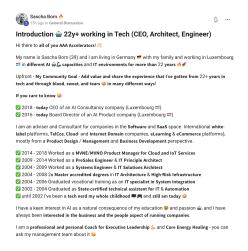


Utilizing the Skool Community 🤝

There is no better place on earth to find people who need AI automation help than in my free community. There are over 40,000 people, 40% of which are active every month. Each day hundreds of new members join, many of them searching for someone to help them.

To not fully utilize the Skool community as your core resources for networking, finding clients and soaking up new ideas is a huge missed opportunity for growth. Check off each of these and don't stop coming back until you get where you want to go:

Make an introduction post in the Skool community: Now that you have skills, you need to sell yourself! While most of you won't have these kinds of credentials, a great example of an introduction post can be found here:



Offer your services for free projects: Make a post stating your skills and the kinds of
projects you can help on. Example that worked well <u>here</u> .

Monitor and engage in the community daily: Every day there are hundreds of people joining the community. Keep an eye out for interesting people and posts (especially the 'Hiring/For Hire' tab), drop a comment and try to connect or DM them to start a conversation. If you do this daily, you will build up a substantial network and find opportunities to work easily. Set a reminder on your Calendar to spend 15 minutes engaging with others.

Extremely Important 1



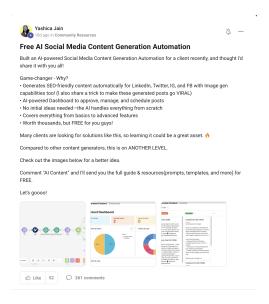
Work will not *magically* come to you. Some people post their introduction and think that's the end of it.

Doing the first two tasks above is 5% of the work. The other 95% is in the constant checking of the "For Hire/Hiring" tab in the Skool community to look for new opportunities.

Stop expecting the world to come to you. If you want work, go get it by regularly monitoring for new hiring posts (e.g. this) and letting them know you're ready to work (comment + DM them)



☐ Share your builds in the Skool community: Every time you build something for yourself or others, make a post in Skool breaking down what you've done. Put some effort into it, shoot a Loom video to show others how to do the same. Doing this consistently will attract a lot of interest in your services. See the "Community Resources" tab on Skool for examples like this.



☐ Steal ideas: If you run out of ideas to build and post about, start stealing others! Go onto LinkedIn, YouTube or even in the Skool community and get inspiration for your next builds. No-one cares, I certainly don't care if you steal mine!

Start Warm Outreach 📤



- Listen to the <u>Hormozi \$100m Leads podcast</u>.
- Follow his instructions on how to build your list of warm leads
- ☐ Set a target of sending 20 personalized messages to new people per day + send follow ups & replies
- □ Track your progress in a spreadsheet

Secrets to Success **

All of you want to succeed. Few of you are willing to do what it takes to succeed.

If you follow the instructions above and:

- 1. Regularly build new things and share your learnings in the Skool community
- 2. Check the Hiring/For Hire board daily and engage with all posts
- 3. Send 20 new messages to warm contacts each day & track in a spreadsheet

This really is not much to do. After 2 months, you will be ready to get paid for your work.

Success is really a lot of boring work like this done over and over. I've given you the formula, now you get to decide if you really want it or not.



Tracking Your Free Client Work

With consistent warm outreach and posting and activity in Skool you will have found a number of people to do free builds for. Track your builds below in **detail** as they will be needed to land your first **paid clients** in phase 3.

I have provided you with a **post-project reflection template** to fill out on the next page. Here is what a finished one should look like:

Project Reflection Example

Client: Uncle Bob's Plumbing Lead Source: Family (my uncle) Industry: Local Plumbing Timeline: 4 days (basic setup)

Solution Description: Simple ChatGPT-powered chatbot that answers FAQs about plumbing

services and collects customer details for quotes

Key Features Built:

1. Basic FAQ responses (services, hours, areas covered)

2. Name/address/issue collection form

3. Sends customer details to Uncle Bob's email

Results Achieved:

- 1. Handles basic questions when Uncle Bob is on jobs
- 2. Collects customer info more consistently than phone calls
- 3. Saved about 30 mins per day answering repeat questions

Client Feedback: "It's not perfect but it helps answer the basic stuff when I'm busy. Better than missing calls completely."

Key Learnings:

- 1. Start super simple my first version tried to do too much
- 2. Test lots with the actual client before going live
- 3. Need to learn more about handling specific industry questions

What I Would Do Differently:

- 1. Get more examples of real customer questions first
- 2. Make the messages sound more casual/friendly
- 3. Ask for help in the Skool community with the prompt engineering



Project 1



Project 2



Project 3

Client: Lead Source: Industry: Timeline: Solution Description:			
Key Features Built:			
1.			
Results Achieved:			
•			
Client Feedback:			
•			
Key Learnings:			
1.			
What I Would Do Differently:			
•			



Post-Projects Analysis 🔍

Now that you've done at least 3x free projects, take a moment to reflect on your progress in this 'Apply' phase of your journey.

It's likely that while you did build something, the result was not super valuable for your clients. This is okay, and why do we do it for free!

•

Most Valuable Skills Learned:

1.

Areas for Improvement:

•

Ready for Paid Projects? Why/Why Not:



PHASE 3: MONETIZE



Months 5-6: Start Charging for Your Services

Once you have at least three successful free project deliveries, you're ready to start monetizing your skills.

As you will have learned in <u>this video</u> of the free course, pricing is based on your skills and experience. How you charge for your services will constantly be evolving over time as you become more skillful and experienced and as you hire people who bring their own skills and experience.

GOAL: Land your first paying client at a low price point, then slowly increase your prices over time.

REASONING: You're still not an expert Al solutions architect. You have a long way to go yet, but you are good enough to start being compensated for your time and expertise.

In this section I'll break down the strategy to start landing your first paying clients:

- 1. Handle the Formalities 👔
- 2. Keep Doing What's Working V
- 3. Personal Brand Launch 🚀
- 4. Explore Other Lead Generation Methods 🧲
- 5. Hiring Your First Developer 🌉





Handle the Forma	lities	
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Before you start taking on paid clients, get your business basics in order:

☐ Set up a payment processor
☐ Choose either Stripe or PayPal (or both)
☐ Create an account as a sole trader/proprietor (no need for an LLC at this point)
☐ Learn how to send an invoice (quick YT search will do)
☐ Get your contract template ready
☐ Watch my <u>video on contracts</u>
□ Download the template
☐ Create your proposal template
☐ Create a copy of my proposal template
Customize it with your branding (use an Al logo generator)
Keep Doing What's Working 📈
The easiest way to move from free to paid projects is to keep doing more of what we did in phase 2! Now that you have more experience and a more substantial track record of projects, you are justified in asking to be paid,
The Skool community can provide <i>all</i> the paid clients you need. Don't overcomplicate things - sticking to what worked in Phase 2 will provide you with leads, but now you will charge for your services.
Weekly To-dos:
☐ Share detailed breakdowns of your builds on Skool: The cooler the stuff you build, the more interest you'll get on your Skool posts! This is the best way to showcase your skills and generate leads.
Daily To-dos:
Check the Hiring/For Hire board daily: This is still the best way to find people who need
your services, don't stop checking it!
■ Network within the community:
o Comment on others' posts
Share your expertise for all to see
 Build genuine relationships by hopping on calls with people you find interesting

Key Takeaway 🔑

You don't need *fancy* marketing tactics to get your first paying clients. The community that helped you learn can become your client base too!



Personal Brand Launch 🚀

Now it's time to launch your personal brand so you can start building the momentum you need to unlock an unlimited source of leads.

At Morningside we've never had to:

- Run cold email or outreach campaigns
- Run paid ads

We have built everything through effective personal branding on YouTube. While this isn't realistic for everyone, using content creation to build a brand that attracts your target audience to you is one of the most important strategies for long term success.

Don't Overcomplicate It!

Diels Verry Dietferm

Your content creation should just be a **natural extension** of the kinds of value posts you were doing in Skool.

For YouTube, this just means filming a screen recording style video that explains what you built and how they can set it up themselves. For LinkedIn it means copying over the post exactly as you have been doing in Skool.

Pick four Platform 🔊				
Choose ONE platform to focus on:				
For YouTube:				
 Watch <u>this Udemy Course</u> (same one I watched) □ Film YouTube Videos On Your Smartphone By Yourself [6 Easy Steps]				
For LinkedIn:				
 How to Go From 0 to 10,000 Followers on LinkedIn in Less Than 6 Months The Best LinkedIn Content Strategy in 2024 LinkedIn Content Strategy Framework 2024 - How to Get Started Building A Powerful LinkedIn Presence: Tips from a LinkedIn Expert 16 Algorithm Hacks To Grow Your LinkedIn In 2024 				
Choose your platform:				
☐ YouTube ☐ LinkedIn				



Explore Other Lead Generation Methods <	
Different methods work better for different niches. Time to expand your toolkit:	
 □ Watch this video. □ When you have got LinkedIn / YouTube growing consistently, start to experiment with other lead generation sources 	ər
Hiring Your First Developer 🌉	
Once you have a steady stream of leads, it's time to scale:	
 □ Watch this video. □ Watch this video. □ Decide on the best hiring strategy for your situation (e.g. hourly, revenue share, salary) □ Post in the Skool community that you are hiring □ Interview 5-10 candidates 	

Conclusion 📝

That's the next 6 months for you laid out, step by step with every resource you need to get your Al Automation Agency off the ground.

I seriously cannot do much more to help you.

☐ Hire the best one on a trial

Now you must help yourself.

If at any point you are struggling and feel like giving up, have a read through my old blog posts from when I was at the **exact same point** in my journey as you are now.

It won't be easy, but I promise it's worth it.

