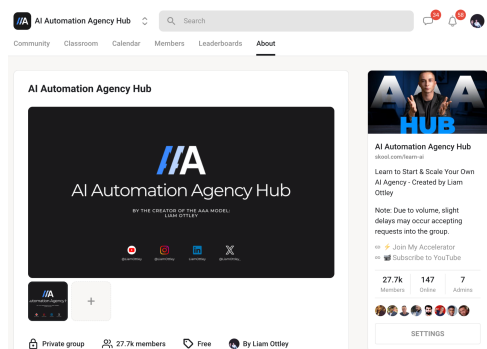




6-Month AI Automation Agency Roadmap

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

Free Resource by Liam Ottley



[Join Skool](#) | [YouTube](#) | [X](#) | [Instagram](#)

Introduction

You've made the decision to start your AI 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
 - 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

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?

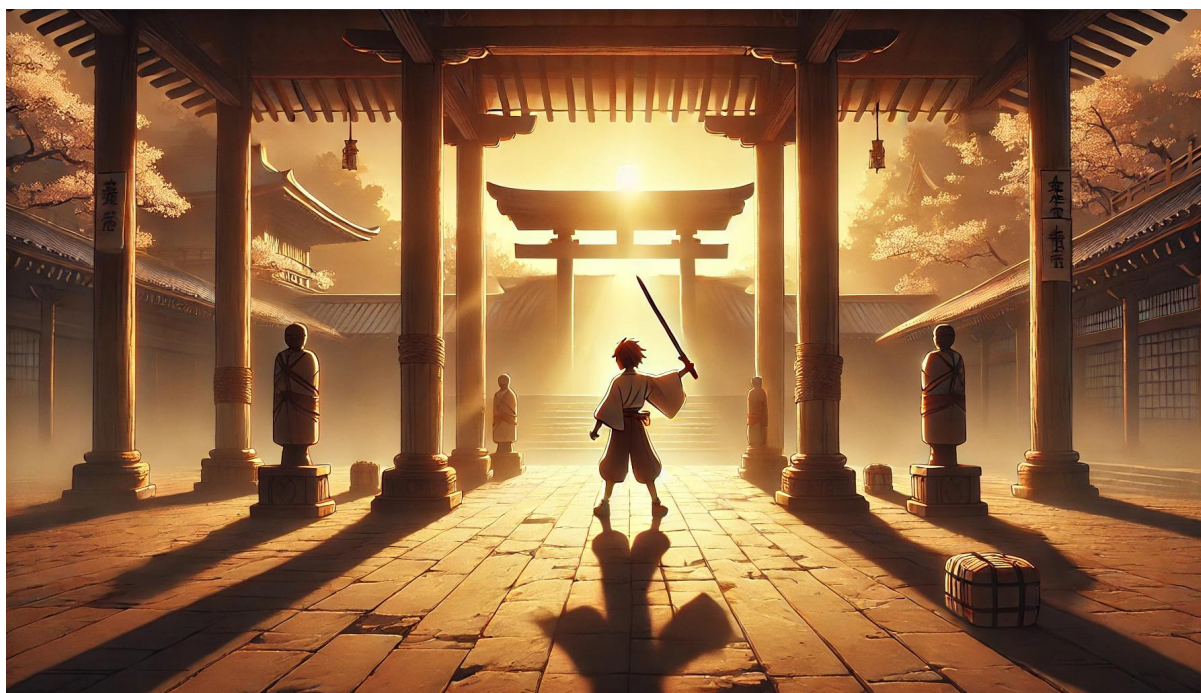
Liam 



PHASE 1: LEARN

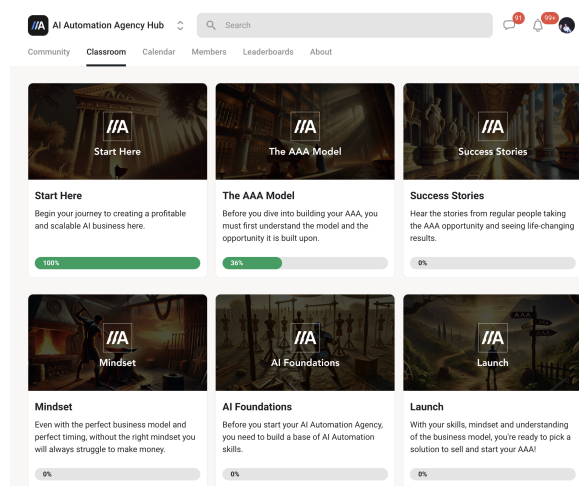


Months 1-2: Build Your Skills



During these first two months, your only focus is on **completing the free course** in the [Skool](#) community. This will provide you with the foundational understanding and skills needed to start your AI 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!
-

- ☐ **AI Foundations:** Building a base of AI 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!
-

- ☐ **Marketing:** Learn how to get clients for your AI Automation services, which can be challenging for beginners.

Notes

- Add your notes here!
-

- ☐ **Operations:** Understand how to optimize your sales process, onboard clients, and manage project deliveries.

Notes

- Add your notes here!
-

Reflect on Your Learnings

Now that you've completed the course, you've gained a lot of knowledge about how to start an AI Automation Agency and how to build AI solutions.

Before you move on to phase two, it's important to reflect on the progress you've made so far.

- ☐ Look over your notes from the course and write down your 10 most important takeaways/learnings:
 1. **{key takeaway 1}:** {explanation}
 2. **{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 AI 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. [Tutorial](#).
- 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!

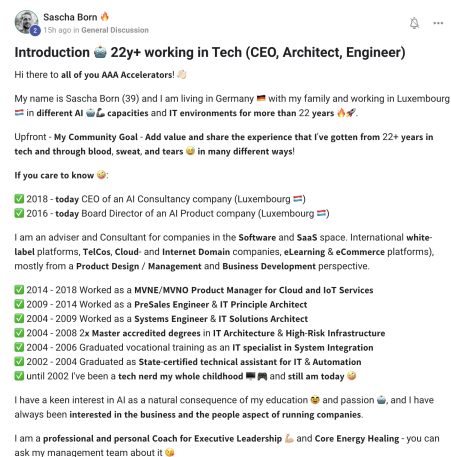


Utilizing the Skool Community 🤝

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 [here](#).
- ☐ **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.

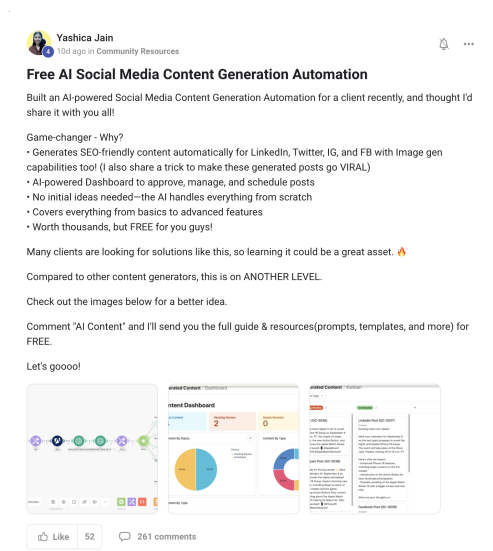
Extremely Important ⚠️

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 [Hormozi \\$100m Leads podcast](#).
- ☐ 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

Client:

Lead Source:

Industry:

Timeline:

Solution Description:

Key Features Built:

1.

Results Achieved:

•

Client Feedback:

•

Key Learnings:

1.

What I Would Do Differently:

•



Project 2

Client:

Lead Source:

Industry:

Timeline:

Solution Description:

Key Features Built:

1.

Results Achieved:

•

Client Feedback:

•

Key Learnings:

1.

What I Would Do Differently:

•



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!

Common Patterns Noticed:

-

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 [this video](#) 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 AI 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 
3. Personal Brand Launch 
4. Explore Other Lead Generation Methods 
5. Hiring Your First Developer 



Handle the Formalities

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 [video on contracts](#)
 - ☐ Download the template
- ☐ Create your proposal template
 - ☐ Create a copy of [my proposal template](#)
 - ☐ Customize it with your branding (use an [AI 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 **all** 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:**
 - 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! 😡

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 Your Platform 🍌

Choose **ONE** platform to focus on:

For YouTube:

- ☐ Watch [this Udemy Course](#) (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

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
- ☐ Hire the best one on a trial

Conclusion

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

I seriously cannot do much more to help you.

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.

Liam 