STAGE 3 GUIDE

Automation

Sales $500k to $1M. From luisromero.com/business-stages.

The one thing: Everything that repeats should happen the same way every time, without you.

THREE MOVES FOR THIS STAGE

1. **Quotes on rails**
   One template, one price book, one follow-up on day three. The customer gets the same quote whether you or your office person sends it.

2. **Scheduling and dispatch in the software**
   Jobs, crews and routes live in one place the crew can see on their phone. If it is on a whiteboard, it is not automated.

3. **Invoices and follow-ups without you**
   Invoice when the job closes, reminder at seven days, card on file where you can. You should not be the reason money is late.

YOU ARE THROUGH STAGE 3 WHEN

- [ ] Quotes go out from a template
- [ ] Crews see tomorrow on their phones tonight
- [ ] Invoices send the day the job closes