



YOUR AI-POWERED BUSINESS ENGINE

Your First 30 Days in dAIsy

What to set up and when. The next 23 days of automations, habits, and metrics — so you arrive at Day 30 with a genuinely powerful system working for you around the clock.

WEEK 1 · DAYS 1-7

If You Haven't Done These Yet

If you've completed the Quick Start Handbook, you can skip to Week 2. If there are any gaps, this is the week to close them.

✓ **New Lead Welcome Sequence is live**

[Automations](#) → [New Lead Workflow](#) — SMS instant reply, email at 5 mins, nudge at 24hrs, value touch at Day 3, soft close at Day 7

✓ **Missed Call Text Back is on**

[Settings](#) → [Missed Call Text Back](#) → **ON** . Customise the message with your name and booking link

✓ **Booking calendar is live and shared**

[Calendars](#) → [Add Calendar](#) . Set availability and buffer times. Share the link everywhere: email signature, social profiles, SMS templates

✓ **Pipeline stages are set up**

[Pipelines](#) → [Add Pipeline](#) : New Enquiry → Contacted → Proposal Sent → Booked → Won → Lost

✓ **Existing contacts imported**

[Contacts](#) → [Import](#) → [Upload CSV](#) . Tag as: past-client, warm-lead, or cold-lead depending on relationship

✓ **First broadcast sent**

[Marketing](#) → [SMS](#) → [Create Campaign](#) . Send to your warm-lead and past-client tags. This often generates same-day bookings

WEEK 2 · DAYS 8–14

Build Your Revenue Automations

This week you add the automations that turn dAIsy from a CRM into a revenue machine.

8–9 Cold Lead Re-engagement Sequence

You have contacts in your database who enquired but never converted. This sequence wakes them up without you doing anything.

[Automations](#) → [New Workflow](#) → [Trigger: Tag Added = 'cold-lead'](#)

Email Day 1: warm re-introduction ("It's been a while — here's what we've been up to")

Email Day 4: genuine value tip for their industry or situation

Email Day 11: short case study or recent result ("We helped a business like yours achieve X")

SMS Day 18: soft, direct offer with booking link

Then: tag every contact who hasn't engaged in 30+ days as 'cold-lead' — the sequence starts automatically

10–11 Appointment Reminder Automation

No-show rates drop by up to 60% with automated reminders. Set this up once and it runs forever.

[Calendars](#) → [Your Calendar](#) → [Edit](#) → [Notifications](#)

Turn on: Email reminder 24 hours before

Turn on: SMS reminder 1 hour before (use Template 3 and 4 from the SMS Playbook)

Turn on: Internal notification if appointment is cancelled — so you can reschedule immediately

12-13

Review Request Automation

This is one of the highest-ROI automations in dAIsy. Every completed job automatically requests a Google review at the perfect moment — when the experience is fresh.

Automations → New Workflow → Trigger: Pipeline Stage Changed to 'Won'

Wait 2 hours (gives the client time to get home)

Send SMS: Template 5 from the SMS Playbook — replace [your Google review link] with your actual Google Business Profile review URL

This runs forever. Every won job = a review request. Most businesses see their review count double within 60 days.

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First Dashboard Review

Take 30 minutes to read what the data is telling you.

Reporting → Overview : how many leads came in? How many converted?

Marketing → Reports : email open rates (target: 30%+), click rates (target: 3%+)

Pipelines : anything stuck in a stage for more than 3 days? That's a lead that needs a personal touch

Automations → Execution Logs : any failed messages? Fix the data and re-send

WEEK 3 · DAYS 15–21

Your First Campaign

By now your inbound automations are running. Week 3 is about proactive outreach — going to your existing contacts rather than waiting for them to come to you.

Plan Your Broadcast

A broadcast is a one-off message sent to a segment of your contacts. Done well, it generates bookings the same day.

1 Choose Your Segment

Start with past-client and warm-lead tags. These are the people most likely to respond. Do NOT blast your entire database.

2 Write Your Message

Keep it personal. The best broadcasts sound like they were written individually. Announce something new, share a relevant insight, or simply reconnect.

3 Send SMS First, Email Second

Send your SMS broadcast first ([Marketing](#) → [SMS](#) → [Create Campaign](#)). The next day, send a complementary email to the same segment with more detail.

4 Monitor Conversations

After sending, sit in Conversations for 30 minutes and respond personally to every reply. dAIsy has done the heavy lifting — now it's your turn to close.

Broadcast formula that works: "Hi {{contact.first_name}} — [Your Name] from [Business]. [ONE sentence about something new, relevant, or helpful]. Worth a quick chat? [booking link] — no pressure at all." Keep it to 3 sentences maximum.

WEEK 4 · DAYS 22–30

Measure and Optimise

Week 4 is about stepping back, reading the data, and deciding what to improve. One improvement per week compounds dramatically over a year.

Metric	Where to Find It	Target	If Below Target
Email open rate	Marketing → Reports	30%+	Test a more personal subject line. Use the contact's first name.
SMS response rate	Conversations → filter by SMS	15–25%	Check message timing and tone. Is it too formal? Too long?
New lead to booking rate	Pipelines report	25%+	Is your instant reply going out fast enough? Check Step 1 of your workflow.
No-show rate	Calendars → Appointments	Under 15%	Are reminder automations firing? Check 24hr and 1hr reminders are on.
Review count (Google)	Your Google Business Profile	2+ per week	Is the review request automation live? Is the link correct?

Day 30 Milestone

If you've followed this guide, by Day 30 you should have: a live 5-touch follow-up sequence, automated appointment reminders, a review request automation running, at least one broadcast sent, and your first real data to make decisions from. That's a properly automated service business — built in a month.