YOUR AI-POWERED BUSINESS ENGINE

The Service Business CRM Cheat Sheet

Pipeline stages, contact tags, and custom fields — the exact structure to set up from day one so dAIsy can automate the right message to the right person at the right time.

Your Pipeline Stages

A pipeline is your visual sales board. Every lead lives in exactly one stage at any time. Here are the stages to create in dAIsy and what each one means.

Stage	Who Is Here	What to Do Next
New Enquiry	Just submitted a form, called, or messaged for the first time	Automated welcome sequence fires immediately — no action needed
Contacted	You or the system has made first contact — awaiting their response	If no reply in 24hrs, send Touch 3 nudge
Qualified	You've spoken, they're a genuine prospect	Send proposal or book the next call
Proposal Sent	Quote or proposal has been sent	Follow up in 48hrs if no response
Booked	Appointment or job confirmed	Send reminder automation — 24hr and 1hr before
Won	Job completed and paid	Trigger review request automation
Lost	Not proceeding — for now	Add to long-term nurture sequence — they may return
Cold Lead	Old enquiry, no engagement in 30+ days	Trigger cold lead re-engagement sequence

Contact Tagging Strategy

Tags let you segment your contacts and trigger the right automations. Use these tags consistently and dAIsy can do the heavy lifting for you.

Source Tags — where did they come from?

Website · Facebook · Instagram · Google · Referral · Paid-Ad · LinkedIn · Cold-Outreach

Status Tags — where are they in the journey?

New-Lead · Active-Prospect · Past-Client · Warm-Lead · Cold-Lead · VIP

Action Tags — what has happened?

Review-Requested · Review-Left · Proposal-Sent · Annual-Upsell-Sent · Unsubscribed · Do-Not-Contact

Campaign Tags — what have they received?

Nurture-Sequence · Cold-Re-Engagement · Win-Back

Essential Custom Fields

Go to `Settings → Custom Fields → Add Field` to create these. They unlock personalisation in your automations and help you track what matters.

Field Name	Type	What It's For
Source	Dropdown	Where this lead came from — drives your 90-day ROI report
Job Value	Currency	Estimated or confirmed value of this client — helps prioritise your pipeline
Last Contacted	Date	When you last personally reached out — prevents leads going cold by accident
Service Type	Dropdown	What service they enquired about — enables segmented campaigns
Referral Name	Text	Who referred them — so you can thank referrers and track your best sources
Notes	Text	Key details from your conversations — personalise every follow-up

The Daily CRM Habit — 10 Minutes a Day

The most successful dAIsy users spend 10 minutes each morning doing three things.

1 Check the Pipeline

Look at anything in 'Proposal Sent' or 'Contacted' for more than 48 hours. Anything stale needs a personal touch today.

2 Review Automation Logs

`Automations → Execution Logs`. Any failed messages (usually a bad phone number)? Fix the data and re-send manually.

3 Move Leads Forward

After every conversation or action, drag the contact to the correct pipeline stage. A pipeline that isn't maintained is just a list.

Power Tip

Add a 'Source' custom field to every contact from day one. After 90 days, go to **Reporting → Contacts by Source**. This single report will tell you exactly where your best clients come from — so you can double down on what works and stop spending money on what doesn't.