ELITE PMO

YOUR PROJECT MANAGEMENT AND AI-POWERED OPERATIONS TEAM

# Erick J. Carmona

AI Operations Systems for Contractors and Service Companies

I help contractors build AI systems that take over the back-office work slowing them down, so the office spends its time on customers and jobs instead of admin work and chasing updates.

## WHERE TIME GETS LOST

- Estimates written from scratch on every job
- PM and insurance portals falling behind on notes, dates and documents
- Emails, texts and team chats where things get missed
- Invoices and reports that sit for days after the work is done
- Payments nobody follows up on until they are overdue
- New-hire paperwork handled by hand

## WHAT THE SYSTEM DOES

### Estimates and invoices

Drafts estimates, invoices and completion reports from job notes and photos in minutes. Your team reviews and approves.

### Portal updates

Keeps property management and insurance portals (Property Meld, AppFolio and others) current, so jobs don't stall.

### Payment tracking

Logs every payment as it comes in, tracks who owes what and drafts follow-ups on anything overdue.

### Hourly check-ins

Reviews email, team chats and portals every hour and reports what changed and what needs a decision.

### HR paperwork

Sends onboarding packets for e-signature, follows up on unsigned forms and files completed ones.

### Runs while you're out

Keeps routine work moving when you're in the field or away. Nothing reaches a customer without approval.

Elite PMO | Erick J. Carmona, Founder & Project Manager

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## PROVEN IN DAILY USE

The system described here is not a demo. I designed and built it for established contractors in Southern California, where it runs the daily operation: estimates and close-outs, payment logging and collections, property management and insurance portal work, HR onboarding, and hourly status checks across email and team chats. It runs in daily use today.

## ABOUT ME



I've been a project and operations manager since 2022, always remote and across several clients at once. I've run day-to-day operations for an executive protection firm and managed projects, scheduling and back-office work for companies in construction, plumbing, real estate and insurance.

I understand what today's contractors demand on the field side as well as the office side: work orders, estimate approvals, vendor portals, crews and the customer on the other end of the phone. My job is to keep all of it moving, so owners can focus on the work and on growing the business.

I'm bilingual in English and Spanish, and I love to stay active and travel.

## WORKS WITH

**Works with the software you already use:** CRMs, field-service and job-management platforms, property management and insurance portals, Google Workspace and Zoho.

- **Built with Claude (Anthropic)**
- Gmail / Google Workspace
- Google Drive
- Zoho
- Property Meld
- AppFolio
- RestCore
- Workiz
- CompanyCam
- AccuLynx
- Leap
- Field-service software
- CRMs (HubSpot)

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## WHAT YOU GET

- Faster estimates and invoices
- Portals that stay up to date
- Payments followed up on time
- Fewer missed messages
- You approve everything that goes out

## HOW WE WORK TOGETHER

**1 Discover**
Walk through how a job moves from lead to payment.

**2 Pick one**
Choose the task that costs your team the most time.

**3 Trial**
I set it up and run it on real jobs for a few weeks.

**4 Expand**
If it saves time, we add the next piece.

### Let's start with one problem

Tell me the task that takes your office the most time. I'll show you how the system would handle it, then set it up on a trial so you can see the results on your own jobs.

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