



Digital Systems & Operations

The complete guide: philosophy, scope, tiers, and what happens at every phase.

This is the full reference for how AK Randall Digital replaces scattered tools with one working system — not a summary, but the actual reasoning behind the scope, the tier structure, and the boundaries we hold. Read it end to end, or jump to the section you need.



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01

Overview & Philosophy

Digital Systems & Operations work replaces the spreadsheets, texts, and tribal memory a growing business runs on with one connected system built around how the team actually works. We start from the real workflow — how a lead comes in, how a job moves, how a proposal gets built — and configure a CRM or Notion workspace around that, rather than forcing the business into someone else's template.

The governing idea is adoption, not setup. A perfectly configured system that nobody opens is worthless — worse than the spreadsheet it replaced, because now there are two sources of truth instead of one. That's why every build ships with training and written documentation as a first-class deliverable, not an afterthought, and why the tier structure scales the same way an organization does: one workflow first, then the connective tissue between workflows, then the access control and reporting a larger operation actually needs.

02

Why This Matters

A business running on scattered tools isn't failing at big things — it's leaking small things constantly: the lead that sat in a text thread for four days, the job status only one person in the office actually knows, the proposal rebuilt from scratch because the last one is buried in a downloads folder.

None of that shows up on a P&L line, but it compounds into missed follow-ups, inconsistent handoffs, and a business that can't grow past what one person can hold in their head. The real ceiling most small operations hit isn't demand — it's that the founder or office manager is the system, and the business can only grow as fast as that person can personally remember and coordinate everything. A real system is what lets the business grow past one person's memory.

03

How We Think About Systems

Three things shape how we scope every system build, regardless of tier:

- **The workflow comes first, the tool second.**

CRM and Notion are both flexible enough to be configured badly. We map the real workflow before opening either one, so the tool gets bent to the business instead of the other way around.

- **A system that isn't used doesn't exist.**

Most failed CRM rollouts fail on adoption, not configuration. Training and written documentation are core deliverables here, not optional extras layered on at the end.

- **Structure should scale ahead of headcount, not behind it.**

Role and permission setup at Growth, and enterprise-grade access control at Custom, exist so the system doesn't need to be rebuilt every time the team grows.

These are operating principles drawn from how we scope engagements, not third-party research citations — we'd rather tell you plainly how we think than dress up a generic statistic as if it were specific to your business.

04

Tiers in Depth

	Starter	Growth	Custom
BEST FOR	Scattered tools — spreadsheets, texts, memory	A CRM/Notion setup that exists but isn't used	Enterprise-grade structure needed
SCOPE	One core workflow, intake form, pipeline stages	Multi-workflow architecture, 2-3 tools automated	Multi-system integration, custom reporting
VISIBILITY	1 dashboard/status view	Custom dashboards, document/proposal templates	Inventory/build/job tracking, admin documentation
ACCESS	—	Role & permission setup	Full role-based access control
HANDOFF	Training call + written guide	Training + written documentation	Team training session

Most clients don't choose a tier upfront so much as land in one after we map the actual workflow — a business that thinks it needs Growth-level automation sometimes turns out to have one workflow that's actually broken, which is a Starter engagement with a clearer name.

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What's Not Included

- **Migrating years of historical records beyond a reasonable starting set.** A full historical import gets scoped separately once we know the real volume and condition of the data.
- **Software or platform subscription costs.** CRM/Notion licensing stays in the client's own account.
- **Custom software development outside the platforms in use.** We configure and connect existing tools; we don't build new standalone software here.
- **Ongoing day-to-day system administration after handoff.** Training and documentation are built so the team can self-administer; we're not an outsourced admin desk.
- **Content for templates.** Proposal copy and contract language are the client's own — we build the structure they populate.

* These boundaries are inferred from what's in scope, not itemized separately in every contract — worth confirming case by case.

A FEW QUESTIONS WE GET

"Can you migrate all our old records?"

We bring over a reasonable starting set; a full historical migration is scoped once we know the volume.

"Will you manage the system for us afterward?"

Not day-to-day — the handoff is built so your team can run it themselves.

"Do we still pay for the CRM/Notion plan itself?"

Yes — licensing stays in your account, separate from this engagement.

06

How It Works, Phase by Phase

● 01

Map

We map the actual workflow — how a lead, job, or document moves today, where it breaks down, and who touches it — before touching any software.

From you: a walkthrough of how work moves today, warts and all.

● 02

Design

The system architecture is designed around that real workflow: which stages, which fields, which tools connect, and who has access to what.

From you: sign-off on the proposed structure before we build.

● 03

Build

We build the workflow out in the chosen platform — pipelines, automations, dashboards — and test it against real records, not sample data.

From you: a sample of real records to test against.

● 04

Operate

The team is trained on the live system, with written documentation to reference, so the system is understood and owned, not just handed over.

From you: attendance at the training session(s).

WHO THIS IS FOR

Businesses ready to run on one real system instead of scattered tools and memory.

NOT A FIT IF

You want software with no change to how the team actually works — adoption requires some process change.

Starting range: varies by tier and scope — discussed once we've mapped the workflow.