



Digital Systems & Operations

Turn scattered tools into one system that actually gets used.

OVERVIEW

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 goal is adoption, not just setup: a system nobody opens is worthless, so every build ships with training and documentation, scaling from a single workflow for a small operation to enterprise-grade access control and reporting for a larger one.

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 fix isn't more software — it's one system structured around the real work, that people actually use.

WHAT'S INCLUDED — BY TIER

■ Starter

A business running on scattered tools — spreadsheets, texts, memory.

One real workflow, set up right.

CRM or Notion setup for one core workflow, a lead intake form, and basic pipeline stages.

Visibility from day one.

One dashboard/status view so the team can see where things stand without asking around.

Actually usable. A training call plus a written guide, so the system gets adopted, not abandoned.

■ ■ Growth

A CRM or Notion setup that exists but doesn't actually get used.

Structure across the operation.

Multi-workflow CRM/Notion architecture connecting the different ways work moves through the business.

Less manual glue. Automations connecting 2-3 tools, plus custom dashboards and document/proposal templates.

Set up to last. Role & permission setup, with full training and written documentation.

■ ■ ■ Custom

An operation that needs enterprise-grade structure — role-based access, inventory/build tracking.

Enterprise-grade structure. Role-based access control across every tool in use.

Track the actual work. Inventory, build, or job tracking wired into the same system.

Connected & reported. Multi-system integration, custom reporting views, admin documentation, and a team training session.

WHAT'S NOT INCLUDED

- Migrating years of historical records beyond a reasonable starting set.
- Software or platform subscription costs (CRM/Notion licensing itself).
- Custom software development outside the CRM/Notion/automation platforms in use.
- Ongoing day-to-day system administration after handoff.
- Content for templates (proposal copy, contract language) beyond structural setup.

Final scope, exclusions, responsibilities, and third-party costs are confirmed in the written proposal for each engagement.

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.

HOW IT WORKS

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.

02

Design

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

03

Build

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

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.