

How to Run the Business

Operations, Systems & Weekly Execution for Founders

Build the backend of your business so you can serve, sell, follow up, and grow — without chaos.

THE STRATEGY COUNSEL

FUNDABLE • VISIBLE • COMPLIANT



Welcome — Why Operations Matter

Most founders are brilliant at their craft. They know how to serve clients, cast vision, and make things happen. But too many are running their business entirely from intuition, memory, and momentum — and it's costing them time, money, and growth.

What We Cover Today

- The 8 core operating systems every business needs
- The R.U.N. Framework for sustainable execution
- Simple SOPs and automation strategies
- Your weekly CEO Dashboard walkthrough

What You'll Walk Away With

A clear, actionable operations blueprint you can implement this week — not someday. Two downloadable templates included at the end of this session.

This is not theory. This is your business, systematized.



A Business Is More Than an Offer

Having a great service, product, or program is your starting point — not your finish line. The business behind the offer is what determines whether you can deliver consistently, scale responsibly, and sustain momentum.



The Offer

What you sell, provide, or deliver — your core value proposition to clients, donors, or customers.



The Operations

The systems, workflows, and repeatable processes that allow delivery to happen reliably — every time.



The Growth Engine

The rhythm of follow-up, content, compliance, and tracking that compounds results over time.



Your offer attracts clients. Your operations **keep** them — and keep you sane while serving them.

The Cost of Running Everything From Memory

When your business lives entirely in your head, you become the single point of failure. Every task, deadline, follow-up, and decision depends on you remembering it at exactly the right moment. That's not a business — that's a burden.

Revenue Leakage

Missed follow-ups, forgotten invoices, and lost proposals that never got sent.

Founder Burnout

Constant mental load with no off switch — decision fatigue drains your creativity and clarity.

Inconsistent Delivery

Client experience varies wildly because there's no standard process — only memory.

Growth Ceiling

You cannot hire, delegate, or scale what exists only inside your head.



The Founder Operations Framework

The R.U.N. System

Built for founders who are ready to stop surviving their business and start running it with clarity and confidence. Every sustainable operation is built on three pillars:

1

R — Repeatable

Document and standardize the tasks you do over and over. If it happens more than once, it deserves a system.

2

U — Useful Systems

Build systems that actually work for your stage of business. Simple, lean, and effective — not complicated tools for enterprise teams.

3

N — Next-Step Tracking

Every client, task, and project always has a clearly defined next action. Nothing falls through the cracks when next steps are explicit.



The R.U.N. System is your operating philosophy — it applies across all 8 systems we'll cover today.

System 1: Weekly Planning

R.U.N. SYSTEM

The weekly planning ritual is the foundation of founder execution. Without it, you react to everything and initiate nothing. A strong weekly planning session — 30 to 60 minutes, every Monday — sets your intention and protects your time.

01

Review Last Week

What got done? What carried over? What needs follow-up today?

02

Set Your Top 3 Priorities

Identify the three highest-leverage activities for the week — revenue, delivery, and compliance.

03

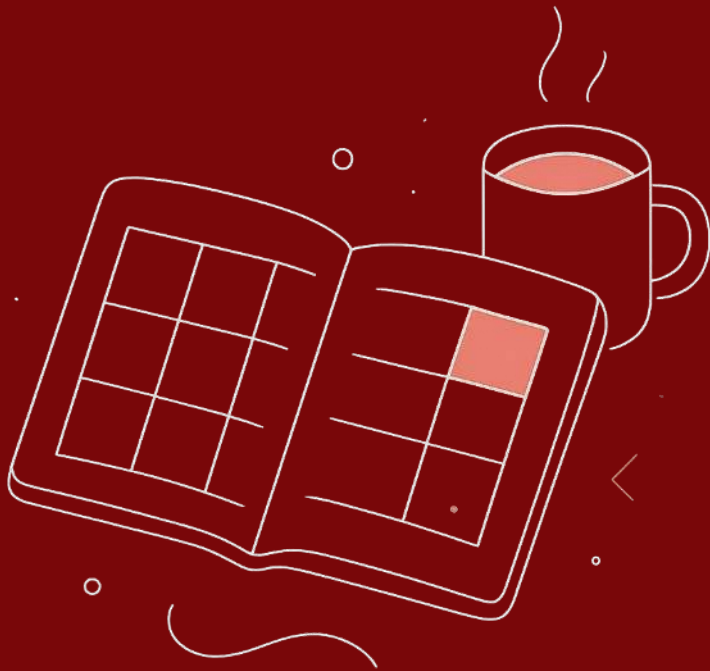
Block Your Calendar

Assign dedicated time blocks for client work, CEO tasks, and content creation before the week fills up.

04

Identify Your Weekly WIN

Define the one outcome that, if achieved, makes this week a success. Anchor your focus there.

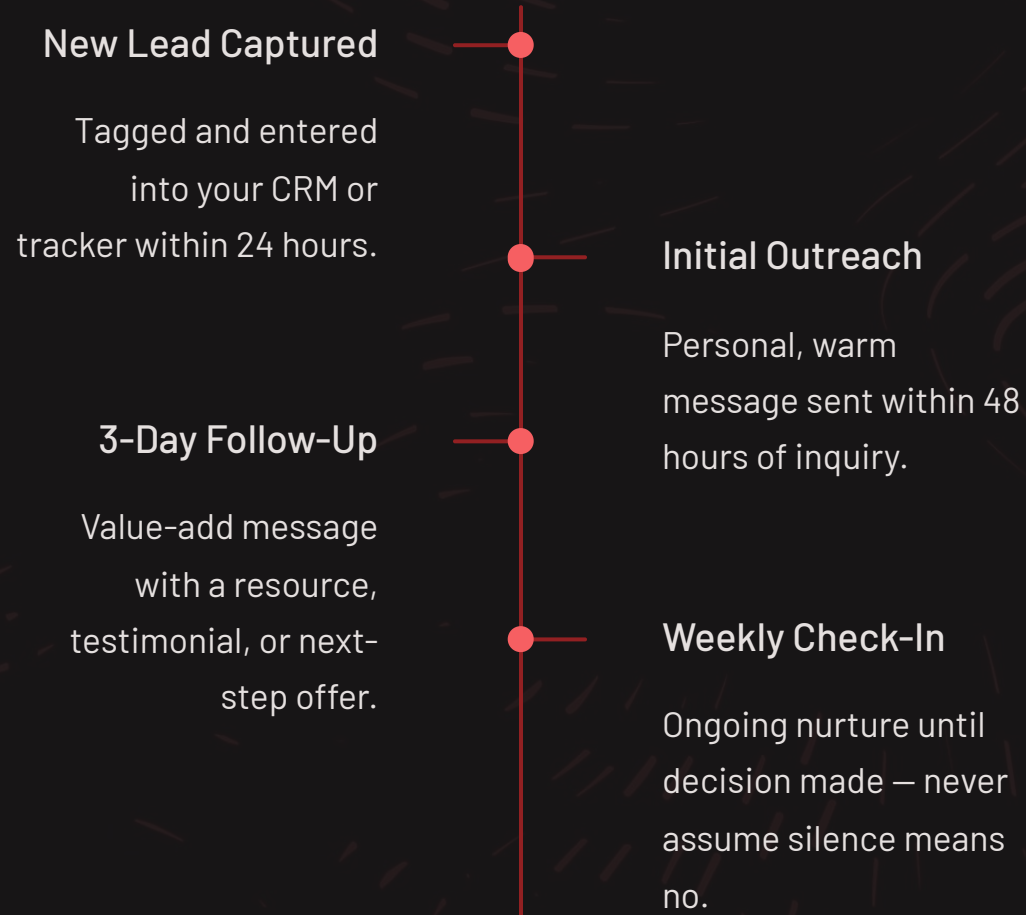


System 2: Client, Donor & Customer Follow-Up

R.U.N. SYSTEM

Follow-up is where revenue lives. Most founders lose money not from bad marketing, but from inconsistent follow-up. A systematic follow-up process ensures that every prospect, lead, and client is accounted for — and nothing slips between the cracks.

The Follow-Up Pipeline



Golden Rules of Follow-Up

- Every lead has a clearly labeled next step
- Follow up at least 5 times before marking cold
- Use a CRM, spreadsheet, or Notion — not your memory
- Automate reminders; personalize the message
- Follow-up is a service, not a sales tactic

System 3: Email & Communication

R.U.N. SYSTEM

Unmanaged communication is one of the top hidden costs in a founder's week. Without clear protocols, your inbox becomes a task list created by other people — and your response time shapes your professional reputation.

Inbox Zero Protocol

Process email twice daily — morning and afternoon. Archive, respond, delegate, or defer. Never leave emails as "to-read" without a decision attached.

Email Templates for Repetitive Sends

Onboarding, proposals, invoices, meeting confirmations, and follow-ups should all have templated drafts. Personalize in 2 minutes — don't write from scratch every time.

Response Time Standards

Set a clear expectation: client inquiries within 24 hours, internal messages within 48 hours. Communicate this boundary in your email signature and onboarding materials.

Communication Channels by Purpose

Email for formal communication. Slack or Teams for team chat. Text for urgent items only. Separate channels prevent confusion and reduce notification fatigue.

System 4: Service Delivery

R.U.N. SYSTEM

Excellent service delivery doesn't happen by accident — it happens by design. A documented delivery system protects your clients, protects your reputation, and protects your time by removing ambiguity from every engagement.



Onboarding Checklist

Every new client completes a standardized onboarding: welcome email, intake form, contract, invoice, and kickoff call — in that order.



Delivery Milestones

Map out every deliverable and due date at the start of each engagement. Clients should always know what's next and when.



Offboarding & Feedback

End every engagement with a closing summary, feedback request, and a referral or renewal ask. Don't just disappear when the work is done.

System 5: Financial Tracking

R.U.N. SYSTEM

You cannot manage what you don't measure. Financial tracking is not just an accounting task — it is a strategic executive function. Founders who review their numbers weekly make better decisions, catch problems early, and move with confidence.

Weekly Financial Pulse

- Total revenue received this week
- Outstanding invoices and due dates
- Upcoming expenses and subscriptions
- Payroll or contractor payments due
- Cash on hand vs. projected needs

Monthly Financial Review

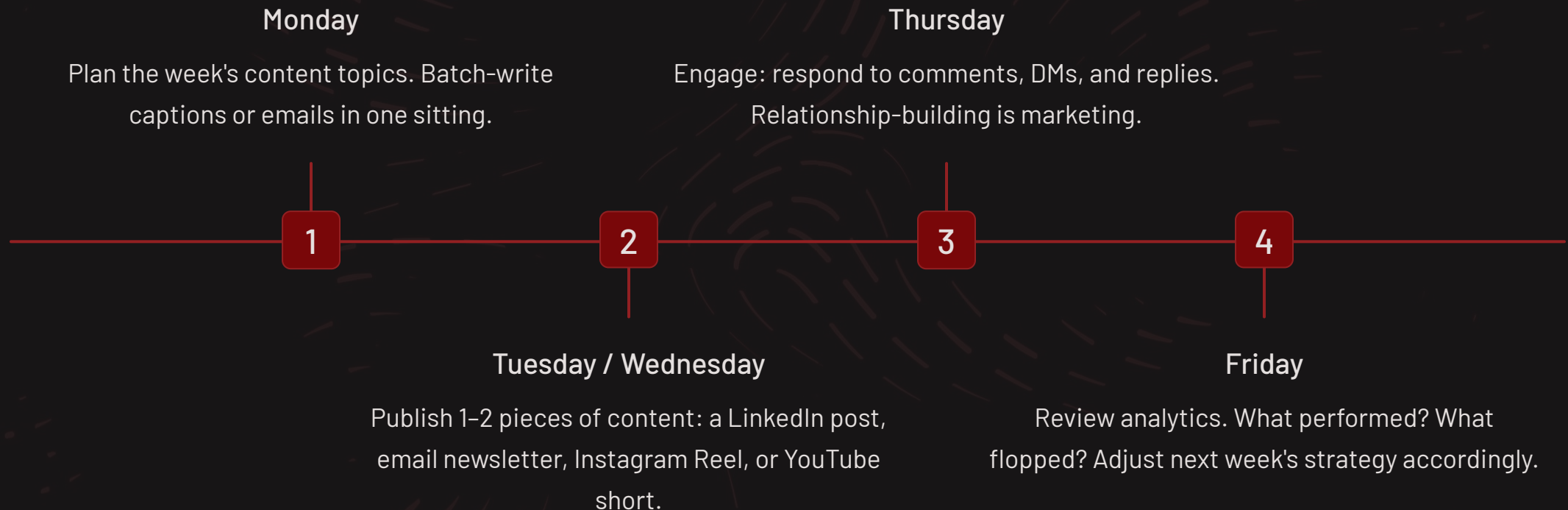
- Profit and loss summary (revenue vs. expenses)
- Reconcile bank accounts and credit cards
- Review sales pipeline conversion rates
- Assess tax obligations and quarterly estimates
- Update your 90-day financial projection

Tools: QuickBooks, Wave, FreshBooks, or a well-maintained spreadsheet. What matters is **consistency**, not complexity.

System 6: Content & Marketing Rhythm

R.U.N. SYSTEM

Inconsistent marketing is one of the most common reasons founders experience revenue roller coasters. A content rhythm — even a minimal one — keeps you visible, positions you as an authority, and generates inbound interest without constant hustle.



Consistency beats creativity. Show up regularly with value — and your audience will find you.

System 7: Document & File Management

R.U.N. SYSTEM

A disorganized file system is a hidden productivity tax. Every minute you spend hunting for a contract, invoice, or intake form is a minute stolen from revenue-generating work. A simple, consistent naming and storage convention fixes this immediately.

1

Folder Architecture

Top-level folders by category: Clients, Finance, Legal, Marketing, Operations, Templates. Each client gets their own subfolder with: Contract, Invoices, Deliverables, and Correspondence.

2

File Naming Conventions

Use a consistent format: YYYY-MM-DD_ClientName_DocumentType. This ensures every file is sortable, searchable, and immediately identifiable by anyone on your team.

3

Cloud-Based Storage

Store everything in Google Drive, Dropbox, or OneDrive. Never rely solely on a local hard drive — your business data should be accessible, backed up, and shareable.

System 8: Compliance & Deadlines

R.U.N. SYSTEM

Compliance is not optional — and missing deadlines can cost your business its standing, its funding, or its licensure. Founders often treat compliance as reactive. The most fundable, visible, and legally protected businesses treat it as a scheduled, proactive habit.



Annual Calendar

Map every recurring compliance deadline: tax filings, annual reports, licenses, grant reports, board meetings, and contract renewals.



Compliance Checklist

Maintain a master compliance checklist specific to your entity type — LLC, nonprofit 501(c)(3), S-Corp, or sole proprietor. Each has different requirements.



30-Day Advance Alerts

Set calendar reminders 30 days before every critical deadline. Never scramble at the last minute for documents that should have been prepared weeks earlier.

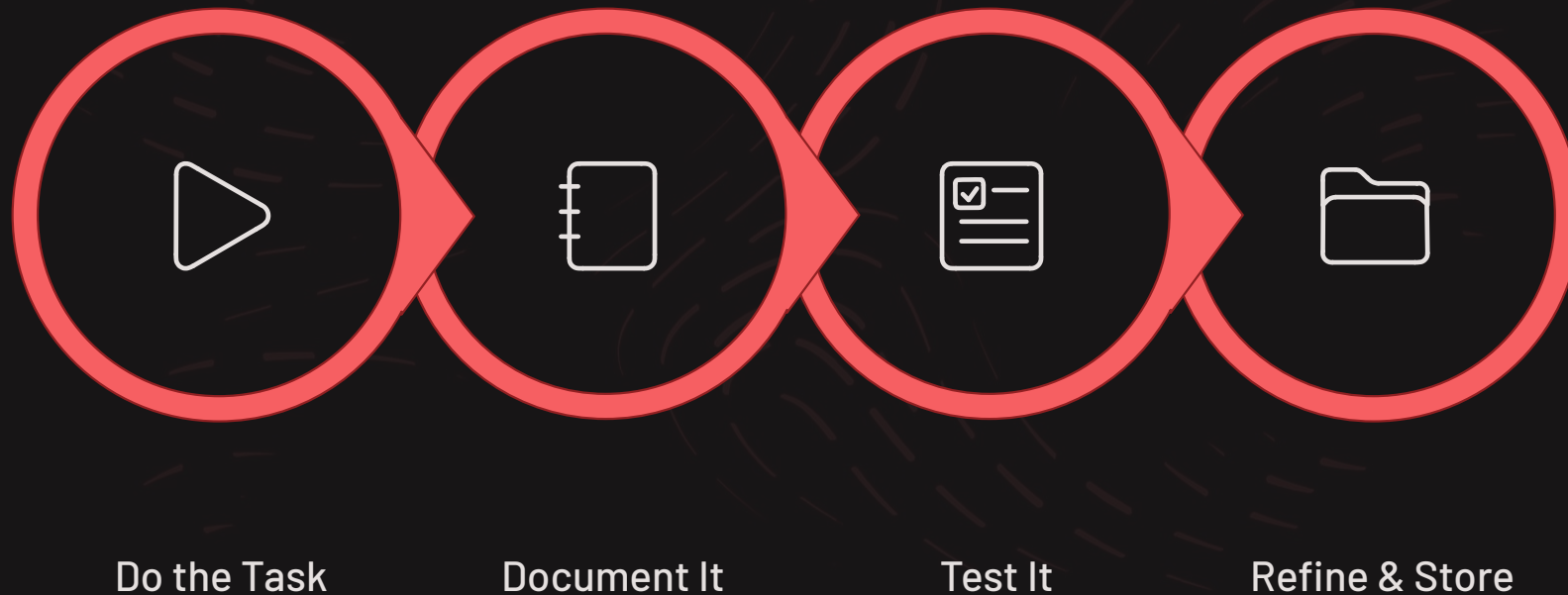


Document Vault

Store all compliance documents — EIN, bylaws, operating agreement, state filings — in a dedicated, password-protected digital vault.

How to Create Simple SOPs

A Standard Operating Procedure (SOP) does not need to be a 20-page document. It needs to be clear enough that you — or someone you delegate to — can execute the task correctly every time. Start simple. Improve over time.



Your first SOP can be a simple Google Doc with numbered steps and a checklist at the top. Tools like Loom (video walkthroughs), Notion (wiki-style docs), or even a PDF work perfectly. The goal is **capture it once, use it forever**.

What to Automate First

Automation is not about replacing your personality — it's about removing the repetitive manual labor that drains your energy. The best candidates for automation are high-frequency, low-judgment tasks that follow a predictable pattern every time.

→ Appointment Scheduling

Use Calendly, Acuity, or HoneyBook. Eliminate back-and-forth emails to find a time. Set your availability once and let clients book themselves.

→ Client Onboarding Sequences

Trigger a welcome email series automatically when a contract is signed or a payment is received. Clients feel cared for; you save hours.

→ Invoice Generation & Payment Reminders

Use Wave, FreshBooks, or QuickBooks to auto-generate invoices and send payment reminders — without a single manual follow-up.

→ Email List Welcome & Nurture

A pre-written email sequence delivers value to every new subscriber — automatically, consistently, and at scale.

What NOT to Automate Too Soon

Over-automation is a real trap. When founders automate processes that aren't yet stable, they lock in broken workflows and create impersonal experiences that erode trust. Some things need your human presence — especially in early-stage and relationship-driven businesses.

Keep These Human

- **First sales conversations** — Your voice and instincts close deals that automation cannot
- **High-stakes client communication** — Sensitive updates, conflict resolution, and complaints require care
- **Strategic decisions** — No tool should replace your judgment as the CEO
- **Relationship-building touchpoints** — A personal check-in text beats an automated one every time

The Automation Readiness Test

Before automating any process, ask:

1. Have I done this manually at least 5 times?
2. Is the process consistent and predictable every time?
3. Would a client notice — or feel negatively impacted — if this were automated?
4. Do I have a way to monitor and audit the automation?

If the answer to #3 is yes, keep it human a little longer.

The Weekly Founder Dashboard Walkthrough

Your CEO Dashboard is a single view of the most important numbers and tasks in your business – reviewed every Monday morning in 15 minutes or less. This is your weekly business vital signs check.

1

Revenue Snapshot

Collected this week, outstanding invoices, and projected monthly total vs. goal.

2

Pipeline Status

Active leads, proposals sent, follow-ups due, and conversion rate this month.

3

Delivery Tracker

Active clients, upcoming deliverables, and any at-risk engagements that need attention.

4

Compliance & Deadlines

Any filings, renewals, or reports due in the next 30 days.

5

Top 3 Priorities

The three CEO-level actions that will move the business forward most this week.

Keep your dashboard in Notion, Google Sheets, or Airtable. What matters is that it's **updated weekly** and **reviewed consistently**.

Download Included: Founder Operations Checklist

 FREE RESOURCE

This comprehensive checklist walks you through all 8 operating systems covered in today's webinar – giving you a clear audit of where your business is strong and where there are gaps to close immediately.

System Audit

Check off each system your business currently has in place – weekly planning, follow-up, email, delivery, finance, content, files, and compliance.

Gap Identifier

Quickly spot which systems are missing, informal, or undocumented – so you know exactly where to focus your next 30 days of operations work.

Quick-Start Actions

Each section includes a 3-step quick-start action list so you can begin building each system even before you leave this webinar.



Check the link in the chat or your webinar confirmation email to access your free download now.

Download Included: Weekly CEO Dashboard + SOP Starter Template

 FREE RESOURCE

Your second download includes two ready-to-use tools that you can plug into your business today — no design experience, no tech setup required.

Weekly CEO Dashboard

A pre-built Google Sheets template with sections for:

- Revenue snapshot and outstanding invoices
- Active client pipeline and follow-up tracker
- Compliance deadlines and upcoming renewals
- Weekly Top 3 priorities and WIN statement

SOP Starter Template

A simple, fillable Word/Google Doc template with:

- SOP title, owner, and last-updated fields
- Purpose and scope section
- Step-by-step numbered procedure format
- Tools, resources, and notes fields
- Space for a Loom video link walkthrough



Ready to Build Your Business the Right Way?

THE STRATEGY COUNSEL

You do not need more chaos. You need a rhythm.

Operations are not administrative busywork — they are the infrastructure of a fundable, visible, and compliant business. The systems you build today determine whether your business grows sustainably or collapses under its own demand.

Operations Strategy Session

Book a 60-minute private strategy session to audit your current systems and build a custom operations roadmap. We'll work through your 8 systems, identify your biggest gaps, and design your founder rhythm — together.

\$97 Strategy Counsel Launch Plan

Join our signature entry-level program to get the templates, training, community, and legal-strategy support you need to run your business like a CEO. Fundable. Visible. Compliant. Starting at just \$97.

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