

01 / THE CHALLENGE

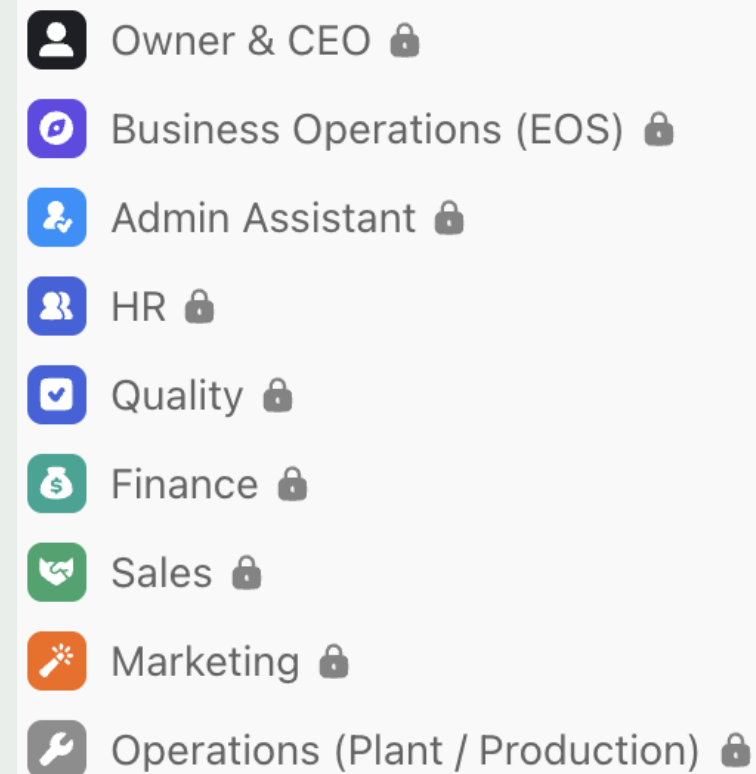
Growth had outpaced the way work got done.

Operational structure for a growing manufacturer

I partnered with the CEO and leadership of an eight-figure manufacturer to diagnose operational gaps and begin building a centralized digital operating structure.

Work lived across email, meetings, spreadsheets, paper, verbal conversations, and individual knowledge. As the company grew, delegation, ownership, visibility, and follow-through became harder to manage.

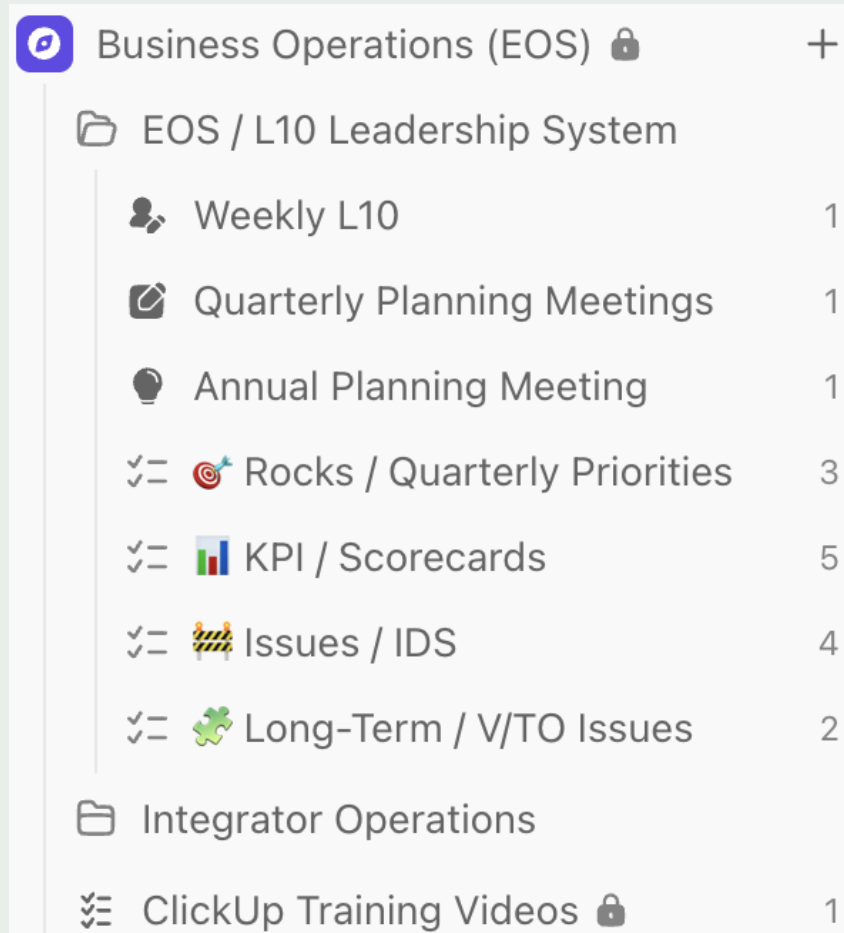
The mandate: make work easier to see, own, delegate, and move forward across the company.



Company-wide workspace architecture

Selected excerpt; identifying details excluded.

Design the structure around how the business works.



A shared home for execution

I translated the gaps into an operating architecture spanning executive leadership, HR, Quality, Finance, Sales, Marketing, and plant operations.

A connected leadership cadence

Weekly L10s, quarterly and annual planning, Rocks, KPI scorecards, Issues / IDS, and longer-term issues were organized within one leadership system.

Structure people can use

Meeting templates, training resources, and defined places for work supported consistent use and a foundation for clearer accountability.

The goal wasn't to put the company into ClickUp. It was to build a system around how the company actually works.

03 / STRUCTURED EXECUTION

Turn an 80+ step process into a repeatable workflow.

The process already existed.

The problem was that coordinating more than 80 steps across stages, owners, handoffs, and dependencies still required people to remember what happened next, follow up manually, and keep everyone else moving.

I translated that operational knowledge into a reusable digital workflow—with clear phases, ownership, dependencies, milestones, and visibility into what happens next.

The goal wasn't to digitize a spreadsheet. It was to turn operational knowledge into a repeatable way of working.

REUSABLE WORKFLOW			Generalized phases and linked steps	
PHASE / TASK		OWNER ROLE	DEPENDS ON	
01	Project Start	Project lead	Start	
	Confirm scope	Project lead	Phase 01	
02	Initial Review	Review team	Phase 01	
	Review requirements	Review team	Phase 02	
03	Project Initiation	Project lead	Phase 02	
	Assign responsibilities	Project lead	Phase 03	
	Coordinate handoffs	Project lead	Prior step	
04	Engineering Input	Engineering	Phase 03	
	Coordinate inputs	Engineering	Phase 04	
	Prepare review package	Engineering	Prior step	
05	Gate Review	Review team	Phase 04	◆
06	Build Phase	Operations	Phase 05	
	Coordinate work packages	Operations	Phase 06	
	Confirm handoff readiness	Operations	Prior step	
07	Sampling Phase	Quality	Phase 06	
	Plan evaluation	Quality	Phase 07	
	Record findings	Quality	Prior step	
08	Customer Approval	Project lead	Phase 07	◆
09	Production Readiness	Operations	Phase 08	
	Confirm documentation	Operations	Phase 09	
	Align team handoffs	Operations	Prior step	
10	Pilot Run	Operations	Phase 09	◆
	Review pilot	Operations	Phase 10	
	Confirm next actions	Operations	Prior step	
Nested steps		Linked handoffs	◆ Review milestone	

Sanitized workflow excerpt — process details and identifying information removed.

Turn leadership discussion into a repeatable operating rhythm.

A meeting with a job to do

I designed the weekly leadership template to connect KPI review, quarterly priorities, issues, decisions, and follow-through in one working record.

Its prompts surface blockers and ownership gaps, clarify action items, and carry open work forward.

The broader value

The system gives leadership a clearer way to see what matters, who owns what, where work is stuck, and what needs to happen next—without relying on the CEO to keep everything moving.

Meeting Agenda

- Use this task as the central weekly agenda, discussion guide, and accountability record for the leadership team.
- Update it live during the meeting, assign action items clearly, and carry open items forward as needed.

KPI / Scorecard Review

- ☐ Review department metrics
- ☐ Discuss trends, concerns, and wins
- ☐ Identify any metrics requiring escalation

Rocks / Quarterly Priorities Review

- ☐ Review progress on quarterly priorities
- ☐ Identify blockers or ownership gaps
- ☐ Confirm status updates

IDS / Issues Discussion

- ☐ Identify operational or leadership issues
- ☐ Discuss lessons learned
- ☐ Determine whether issues require escalation, task creation, or future review

Weekly L10 template / selected agenda excerpts