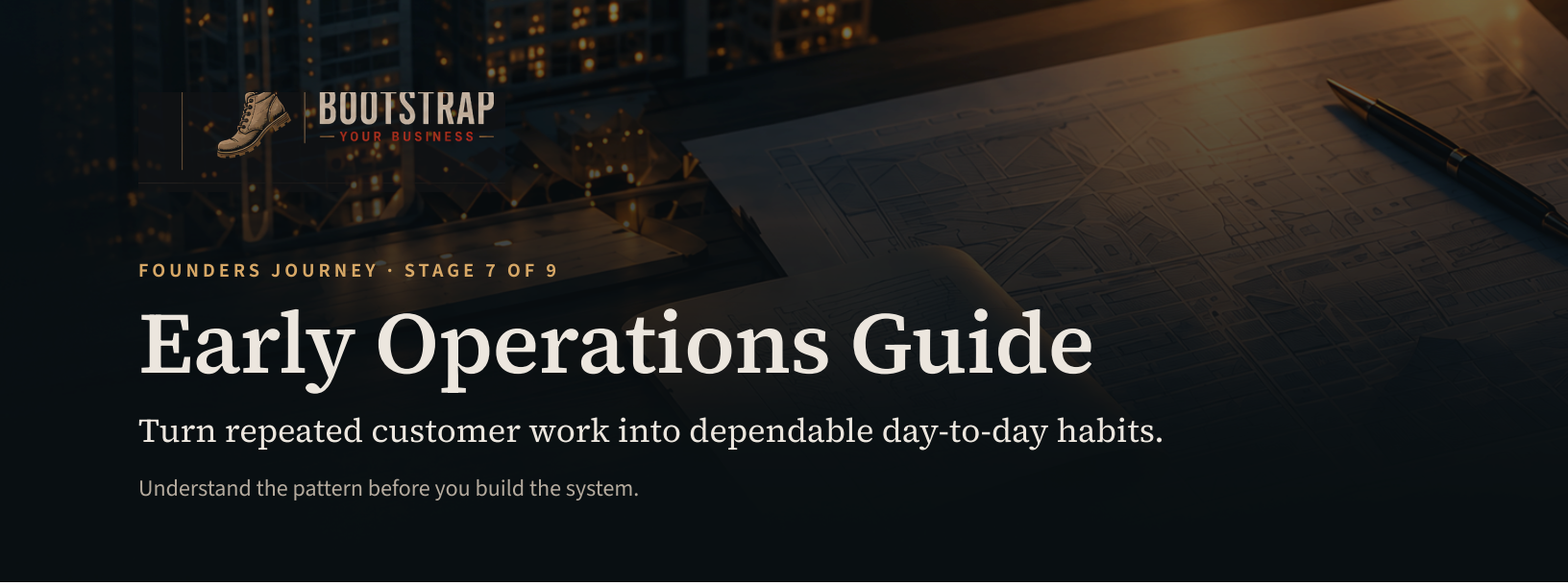


BOOTSTRAP
— YOUR BUSINESS —

FOUNDERS JOURNEY · STAGE 7 OF 9

Early Operations Guide

Turn repeated customer work into dependable day-to-day habits.

Understand the pattern before you build the system.

Early Operations is where repeated customer work starts becoming a real routine. The goal isn't a big-company system. It's making the work visible, dependable, and easier to improve while the business is still learning.

WHAT MATTERS NOW	YOUR FIRST STEP	WHAT COMES NEXT
Customer promises, where each job stands, delivery, money, records, follow-ups, and what keeps going wrong.	Pick one repeated task that needs a more dependable way to be seen or done.	Systemization: turning well-understood work into clear steps anyone could repeat.

WHAT YOU'LL HAVE BY THE END

- A clear picture of the work that repeats with every customer, from yes to follow-up.
- A simple way to keep promises, job status, money, and follow-ups from slipping.
- A better sense of where delays, mistakes, or confusion keep showing up.
- One habit that makes the next customer easier to serve well.

01 See the work that repeats

Make the real customer cycle visible before you try to improve or automate it.

After your first customers, the same steps start to repeat: questions, scheduling, payment, preparing, delivering, following up, keeping records, and fixing problems. Early Operations is where you notice those patterns instead of relying on memory every time.

WHAT TO PAY ATTENTION TO

Customer promises	What you said would happen, by when, and under what conditions.
Where each job stands	What happens next, who's waiting, and what could be forgotten.
Money and records	What needs to be invoiced, collected, recorded, or saved.
What keeps going wrong	The steps that keep causing delays, confusion, redoing work, or customer questions.

> **The core idea**
> Do the work enough times to understand the pattern. Then add only the structure that makes the next round clearer or more reliable.

02 Make repeated work dependable

Use simple habits so repeated work is easy to see and finish.

A useful early routine can be a short checklist, a calendar habit, one shared folder, a simple customer list, or a consistent way to close out each job. The right structure is the smallest one that cuts mistakes and makes the next customer's experience smoother.

QUESTIONS THAT HELP YOU IMPROVE THE WORK

- Which step do I keep having to remember, with no reliable place to see it?
- Where do customers most often ask what happens next?
- Which part of delivery takes longer or causes more mistakes than expected?
- What information do I keep searching for or asking for again?
- What simple habit would stop the same problem next time?

A SIMPLE ROUTINE FOR EACH CUSTOMER

1. Capture	Write down the customer, what you promised, the next step, and key details where you'll see them.
2. Deliver	Do the work, and notice where time, confusion, or redoing work shows up.
3. Check	Confirm payment, records, follow-up, and what the customer expected before calling it done.
4. Learn	Notice what repeated, what went wrong, and what you had to remember or make up on the spot.
5. Adjust	Make one small change that should help the next customer, before taking on more.

Simple beats fancy while you're still learning

A basic routine you actually use is worth more than a polished system that adds complexity without fixing a real, repeated problem.

03 Choose your first step

Steady one repeated part of the customer cycle that's causing risk or friction.

Don't try to write down the whole business at once. Pick one repeated task that affects customers, money, deadlines, or records. Put one simple habit around it, use it with the next customer, and see if it helps.

GOOD FIRST STEPS CAN BE

- Making one place to track active customers and the next step for each.
- Turning a repeated delivery sequence into a short checklist.
- Setting a regular time to review unpaid invoices, upcoming work, and follow-ups.
- Creating one folder or naming pattern for customer records you keep needing.
- Fixing one handoff, scheduling step, or message that has caused confusion more than once.

SIGNS YOU'RE MAKING PROGRESS

- You can see where every job stands without piecing it together from memory.
- Promises, payments, records, and follow-ups have a dependable home.
- Repeated work is getting easier to do the same good way.
- You fix recurring problems instead of living with them.
- Your habits still fit the size of the business you have now.

SIGNS TO SLOW DOWN

- You're writing a big manual for work that changes every week.
- You're automating before you know where things go wrong.
- You're tracking numbers that never change a decision.
- Routines have become a project separate from serving customers.

DO IT FOR LESS

Start free. Pay only at the wall.

Early Operations runs fine on free tools. Most new businesses don't need paid software here.

- Track customers, jobs, and money in a free spreadsheet, like Google Sheets.
- Use a free calendar for appointments and a weekly review of what's due.
- Keep checklists and customer notes in a free notes app or shared folder.
- Use the free plan of a scheduling or invoicing tool before you pay for one.

Move up to a paid tool only when you keep outgrowing the free one, like regularly running out of space, users, or features you use every week. Then move up one plan, not to the top tier.

DO IT WITH AI

Let AI do the heavy lifting

Copy these into any free AI tool, like ChatGPT, Claude, or Gemini. Fill in the brackets first.

> **Turn my steps into a checklist**
>
> *Here's what happens when I serve a customer, step by step:* [your steps]*. Turn it into a simple checklist, and point out where things are most likely to slip or get forgotten.*

> **Design a free tracker**
>
> *Help me design a simple spreadsheet to track my customers for* [your business]*. Suggest the columns I need to see each job's status, what I promised, what's been paid, and the next follow-up.*

> **Find the friction**
>
> *Here's what went wrong or felt messy with my last few customers:* [your notes]*. Tell me which problems repeat, and suggest one small habit to fix the biggest one.*

Check the answer: AI doesn't know how your work really runs. Try any checklist on one real customer and fix what doesn't match.

NOT YET

What can wait

- A big operations manual for work that's still changing every week.
- Automating a process before you know where it goes wrong.
- Buying a complicated set of software because bigger companies use it.
- Hiring people to absorb confusion you should first understand and simplify.
- Dashboards and numbers that don't change a real decision.
- Standardizing everything before enough repetition shows what should stay the same.

COMING UP

Systemization

Early Operations helps you see how the business really works as customer work repeats. Systemization is where steady, important patterns become clear processes that are easier to teach, repeat, measure, or automate where it helps. You move forward when repeated work is understood well enough that a clearer system would help.

Early Operations isn't about building an operations department. It's about making real customer work easier to see, repeat, and improve.