



Operations & Automation Systems Portfolio

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Company Operating System Architecture

Context

A distributed organization operating across marketing campaigns, partnerships, donor initiatives, and events lacked a unified operating structure. Communication occurred across Slack, email, Telegram, Zoom, Google Drive, CRM tools, and spreadsheets. Documentation was fragmented, reporting was inconsistent, and strategic decisions were often buried inside threads or informal conversations.

As the organization scaled its programs and revenue initiatives, the absence of structured visibility created repeated questions, unclear priorities, manual handoffs, and inconsistent execution across teams.





Company Operating System Architecture

Core Operational Challenges Identified

- Fragmented documentation across multiple platforms
- No centralized KPI visibility across initiatives
- Decision context buried in Slack threads and meetings
- Manual handoffs between marketing, partnerships, and delivery
- Repeated questions due to lack of structured ownership
- Unclear priority alignment across concurrent initiatives
- Automation logic undocumented and vulnerable to breakage
- Tool overlap and redundant reporting workflows

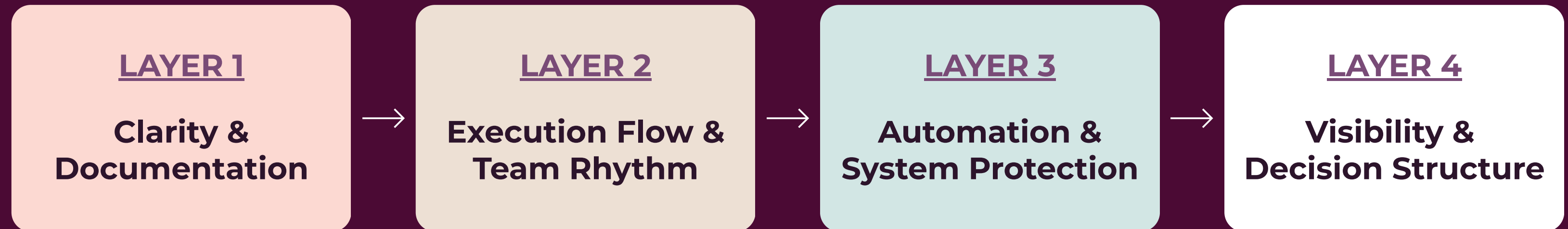




Company Operating System Architecture

The Operating System Designed

To stabilize execution and improve clarity, I designed a layered Company Operating System built around documentation, execution rhythm, automation protection, and decision visibility.





Company Operating System Architecture

Layer 1: Clarity & Documentation

Established a centralized source of truth to eliminate information fragmentation.

- Designed relational database architecture to unify marketing, donor, and partnership tracking
- Standardized KPI definitions and reporting categories
- Built structured SOP library with naming conventions and version control
- Documented automation logic and system dependencies
- Reduced repeated “Where is this?” questions across teams

Result: Documentation became navigable, consistent, and reliable across departments.



Company Operating System Architecture

Layer 2: Execution Flow & Team Rhythm

Defined how initiatives move from idea → ownership → execution → reporting.

- Clarified initiative ownership and accountability per project
- Implemented weekly KPI scorecards to anchor execution to measurable outcomes
- Structured Slack-based check-in rituals to replace scattered status updates
- Reduced manual handoffs between marketing, partnerships, and operations
- Created onboarding workflows to standardize information capture

Result: Execution moved from reactive to structured. Team members understood priorities and ownership at any given time.



Company Operating System Architecture

Layer 3: Automation & System Protection

Stabilized workflows to reduce human error and protect downstream processes.

- Built CRM lifecycle tagging logic across onboarding, nurture, and donor flows
- Integrated website, CRM, and database systems to eliminate manual data transfer
- Automated recurring reporting processes
- Created change logs and dependency documentation to prevent breakages during iteration

Result: Systems scaled without increasing operational chaos or hidden technical debt.



Company Operating System Architecture

Layer 4: Visibility & Decision Structure

Improved leadership clarity and reduced decision ambiguity.

- Designed centralized KPI dashboards for real-time initiative visibility
- Implemented structured OKR tracking system (94.63% completion rate achieved)
- Created a Decision Log Tracker to preserve context and prevent repeated debates
- Standardized how strategic decisions were documented, reviewed, and revisited
- Reduced reliance on Slack thread memory for critical context

Result: Leadership gained faster decision velocity and clearer alignment between strategy and execution.



Decision Governance System

(built in Airtable)

Improved leadership clarity and reduced decision ambiguity.

Decision Log 2025									
Hide fields Filter Group Sort Color Share and sync									
A Decision Title	Decision Date	Decision Owner	Stakeholders Involved	Context / Background	Options Considered	Final Decision	Impact Area	Status	Review Date
Bifurcate Webflow Developer Hiring	March 4, 2025	Shola / Jayce	Marilyn H. Shola A. Jayce D.	Difficulty finding a single Webflow candidate with both front-end design and back-end implementation skills within ...	1) Hire agency; 2) Keep searching for unicorn freelancer; 3) Split into front-end UI/U...	Split the role into front-end designer (Figma) and Webflow implementer. Use paid beta test project for ...	People	Active	March 11, 2025
Migrate Event Registrations from Eventbrite to Luma	April 8, 2025	Shola / Jayce	Marilyn H. Shola A. Jayce D. Ghie A.	Low conversion rates on Eventbrite due to friction and multi-field checkout causing drop-offs.	1) Optimize Eventbrite; 2) Switch to Luma for lower friction and calendar sync	Switch to Luma for faster checkout and automatic calendar sync to improve show-up rates.	Tooling	Active	April 15, 2025
Engage Nonprofit Megaphone for Google Ads	September 9, 2025	Marilyn Holifield	Marilyn H. Shola A. Jayce D.	\$10,000/month Google Ad Grant available. Need internal capacity and ROI clarity before spending \$899/month agenc...	1) Launch in Q3; 2) Delay to align with Q4 fundraising and prepare internally	Delay launch. Target setup mid-September and launch by October 1 aligned with major fundraising ...	Finance	Active	September 30, 2025
Define Beta Test Scope for Field Coordinator Candidate	September 30, 2025	Marilyn Holifield / Shola Abid...	Marilyn H. Shola A. Jayce D.	Offline event coordination lacked dedicated oversight resulting in zero registrations for some events.	1) Manage workshops + screenings; 2) Focus only on screenings	Limit beta to booking one screening in District 13 library within one week using AI-drafted outreach ...	Ops	Active	October 9, 2025
Renew FlowChat Subscription for DM Outreach	May 20, 2025	Marilyn Holifield / Steve (Fina...	Marilyn H. Shola A. Jayce D. Steve H.	Need to scale DM outreach; trial expired; manual outreach insufficient for campaign goals.	1) Manual DM outreach; 2) Resubscribe to FlowChat with nonprofit pricing	Retrieve nonprofit pricing and submit for budget approval to reactivate FlowChat.	Tooling	Active	June 1, 2025
Embed Lead Magnet Form on Homepage	September 16, 2025	Ghie / Tays	Ghie A. Tays A. Shola A.	Low conversion rates on pop-up lead magnet and landing page traffic.	1) Keep pop-up; 2) Embed ActiveCampaign form directly on homepage	Embed sign-up form directly on homepage to reduce friction and increase opt-ins.	Marketing	Active	September 23, 2025



Top-Level Workspace Structure

(built in ClickUp)

Executive ... +

- ✓ Strategic Map
- 📁 About Ali Hively LLC ✓
- 📁 Resources from Lauren M...

Operations ... +

- 📁 ✓ Team To-Do List
- 📁 📄 SOPs
- 📁 💡 Ideas & Recommenda.
- 📁 🎯 Rocks & Goals
- 📁 🎨 Project Plans

Rise Girl™ ... +

- 📁 🎒 Rise Girl™ Schools
- 📁 🏆 Rise Girl™ Clubs

Rise Together™ ... +

- 📁 📖 RG Process Maps
- 📁 🧑🏽 Rise Girl Program
- 📁 Phase 3
- 📁 Phase 2
- 📁 Phase 1
- 📁 🧑🏽 Say Yes to You Program
- 📁 🔔 Marketing Calendar

Executive 🔒 ... +

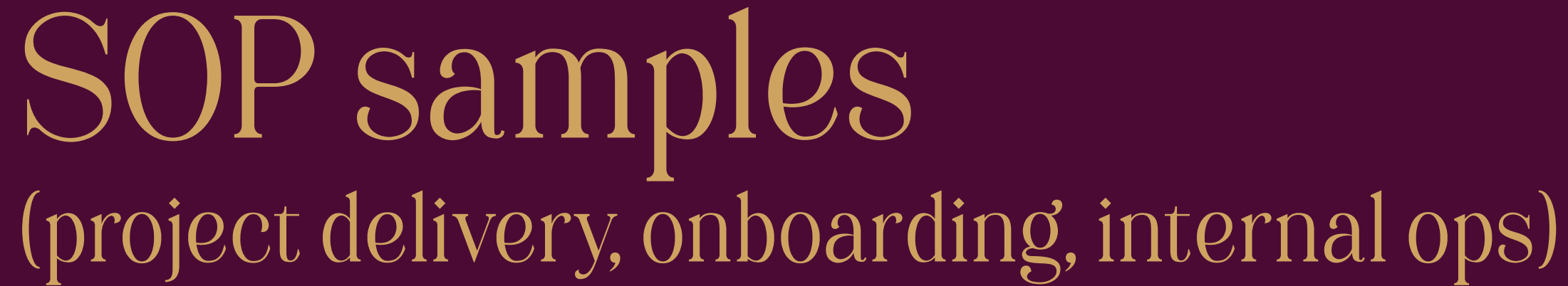
- 📁 1 Personal
- 📁 2 Research & Business De...
- 📁 3 Training & Development
- 📁 0 CEO Biz Stuff

Operations ... +

- 📁 🟢 Team To-Do List
- 📁 🟣 Team Management
- 📁 🟤 Client Management
- 📁 🔴 Archived (Old) Clients

Marketing ... +

- 📁 Content Calendar
- 📁 VA/OBM Client Lead Trac...
- 📁 Affiliate Marketing
- 📁 Marketing Tracker
- 📁 Marketing Calendar
- ✓ Guesting on Other Sh... 19
- ✓ Guest Expert Sessions ... 6
- ✓ Programs 22



Task Name	Template Title	Task Description
SFD Resources for the New MM Website	SFD Webflow Resource	<p>New punchlist link for the live website: https://app.punchlist.com/projects/qaylx1v</p> <p>If you don't find a certain page, just let me know.</p>
SFD Webflow SOPs for the New MM Website	SFD Webflow Resource	<p>MMC - Webflow Training: https://doc.clickup.com/9016046274/p/h/866936/ffc145168139c6e</p> <p>...</p>
SFD Offboarding Checklist	SFD Webflow Resource	<p>1. Final Project Review:</p> <ol style="list-style-type: none"> Conduct a thorough review of the project with the client to ensure all deliverables have been met according to the agreed-upon scope.
SOP: MMC - Webflow Training	SFD Webflow Resource	<p>This guide is our go-to resource for getting started with Webflow. Webflow is a tool that lets us build websites and other development as easily as possible.</p> <p>...</p>

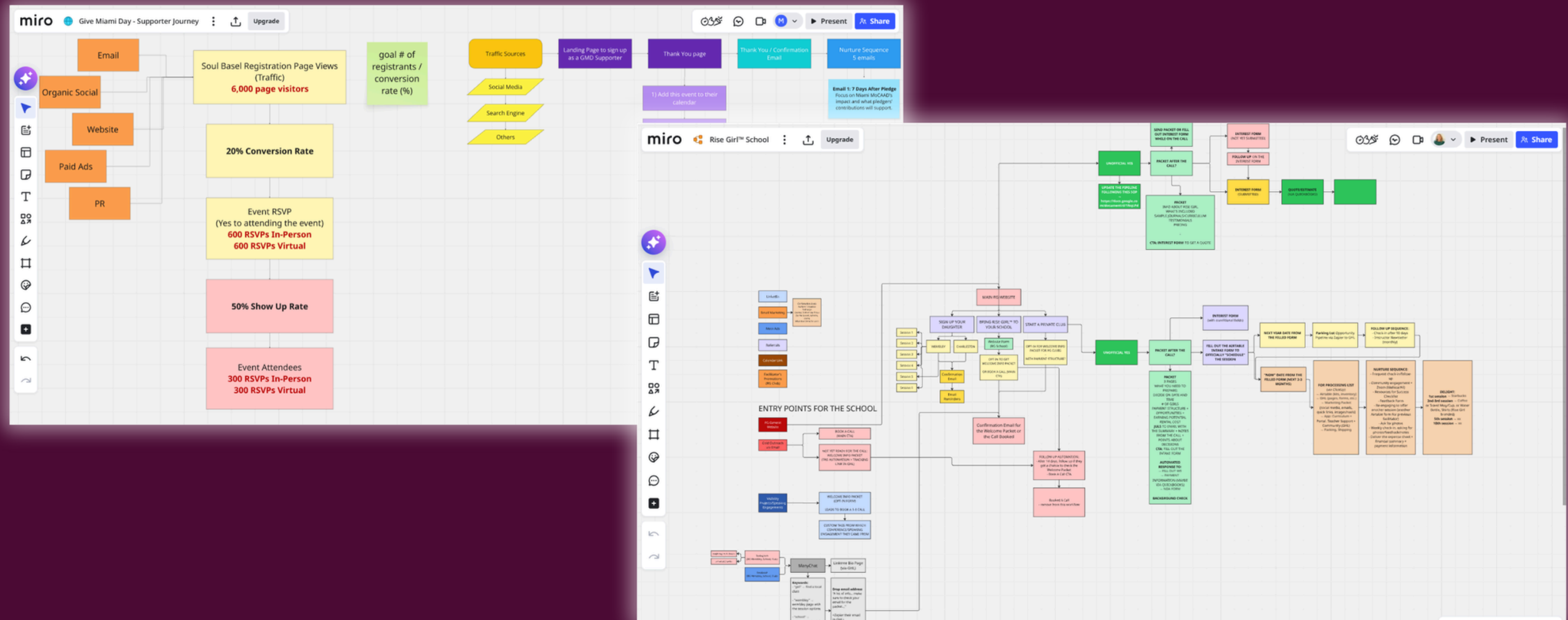
Miami MoCAAD SOPs

Folder

Videos

- Navigating Miami MoCAAD Workspace and Managing... (Jayce Marie Arriola - 9 days Not shared) 2 min
- Updating the Miami MoCAAD Business Profile on Google (Jayce Marie Arriola - 12 days Not shared) 2 min
- App Account Setup and Access Instructions (Jayce Marie Arriola - 12 days Not shared) 7 min
- SOP: [Scorecard] Navigating the Digital Artists Library: Trackin... (Jayce Marie Arriola - 29 days Not shared) 4 min
- SOP: [Scorecard] Art Exhibition (Jayce M... Not shan... 3 min)
- SOP: [Scorecard] Filling Out Website Scorecards Using... (Jayce Marie Arriola - 29 days Not shared) 6 min
- SOP: [Scorecard] Filling Out the Lead Magnet Scorecard Proce... (Jayce Marie Arriola - 29 days Not shared) 5 min
- SOP: [Scorecard] Filling Out Your Email Marketing Scorecard In... (Jayce Marie Arriola - 29 days Not shared) 5 min
- SOP: [Scorecard] Updating YouTube Analytics and... (Jayce Marie Arriola - 29 days Not shared) 4 min
- SOP: [Scorecard] Social Media Metrics Update and Analysis (Jayce Marie Arriola - 29 days Not shared) 7 min
- SOP: [Scorecard] Organizing Your Tabs Using "Groups" in Yo... (Jayce Marie Arriola - 29 days Not shared) 2 min

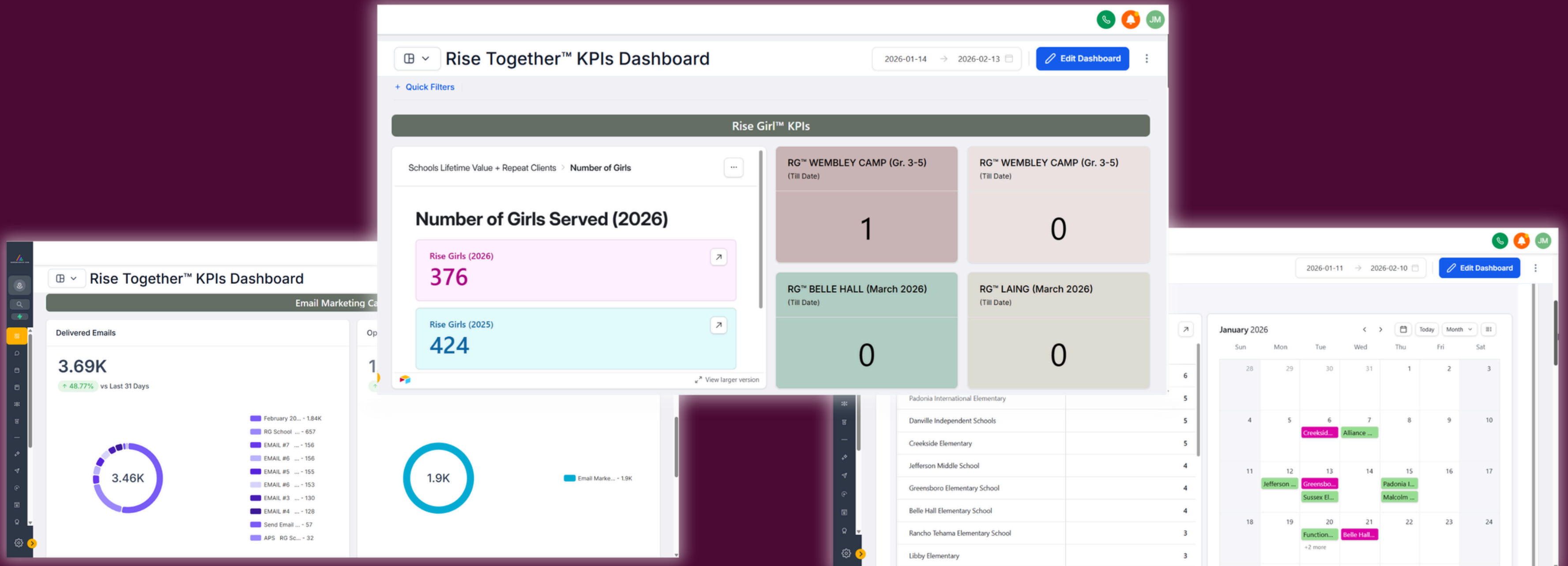
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KPI dashboard examples

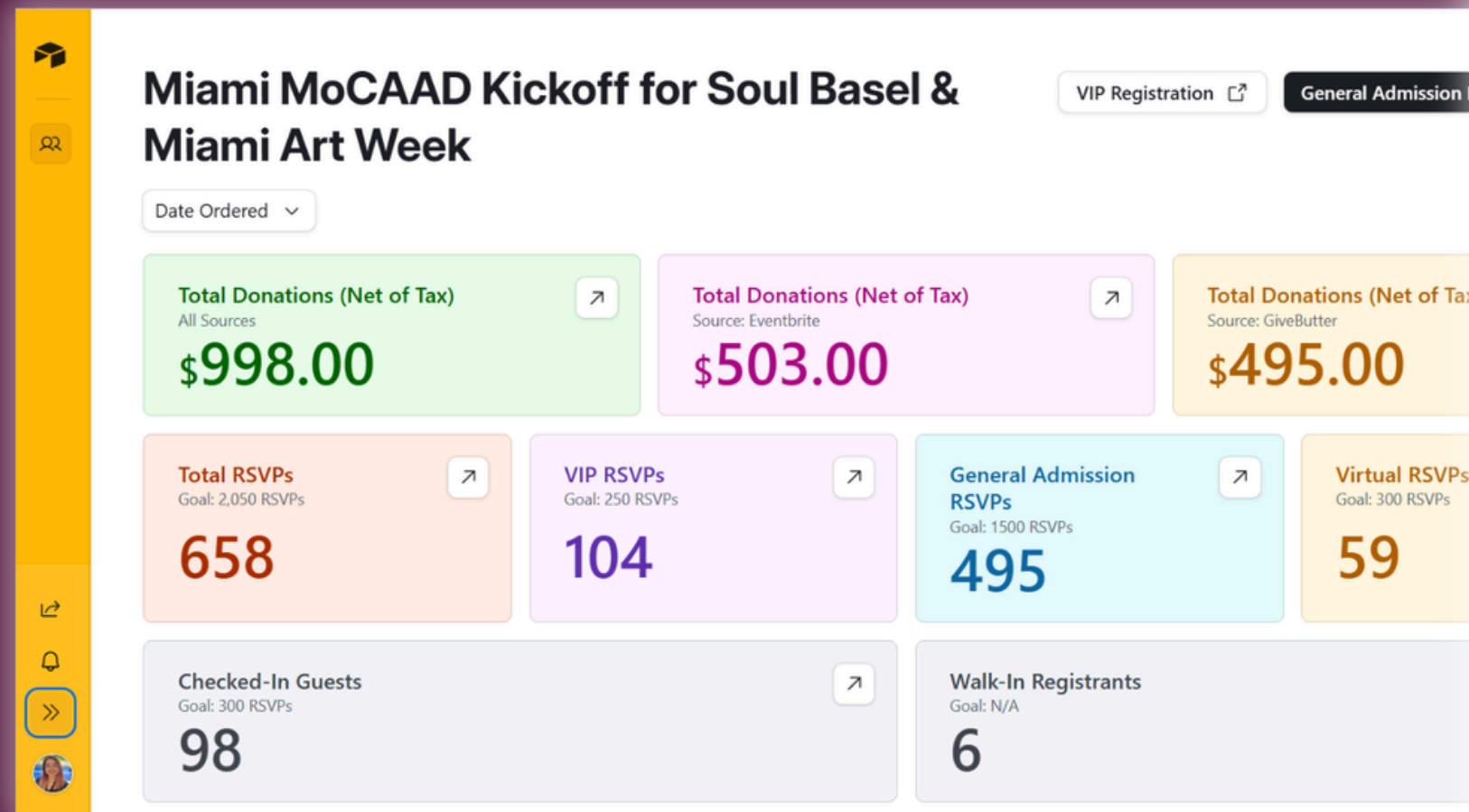
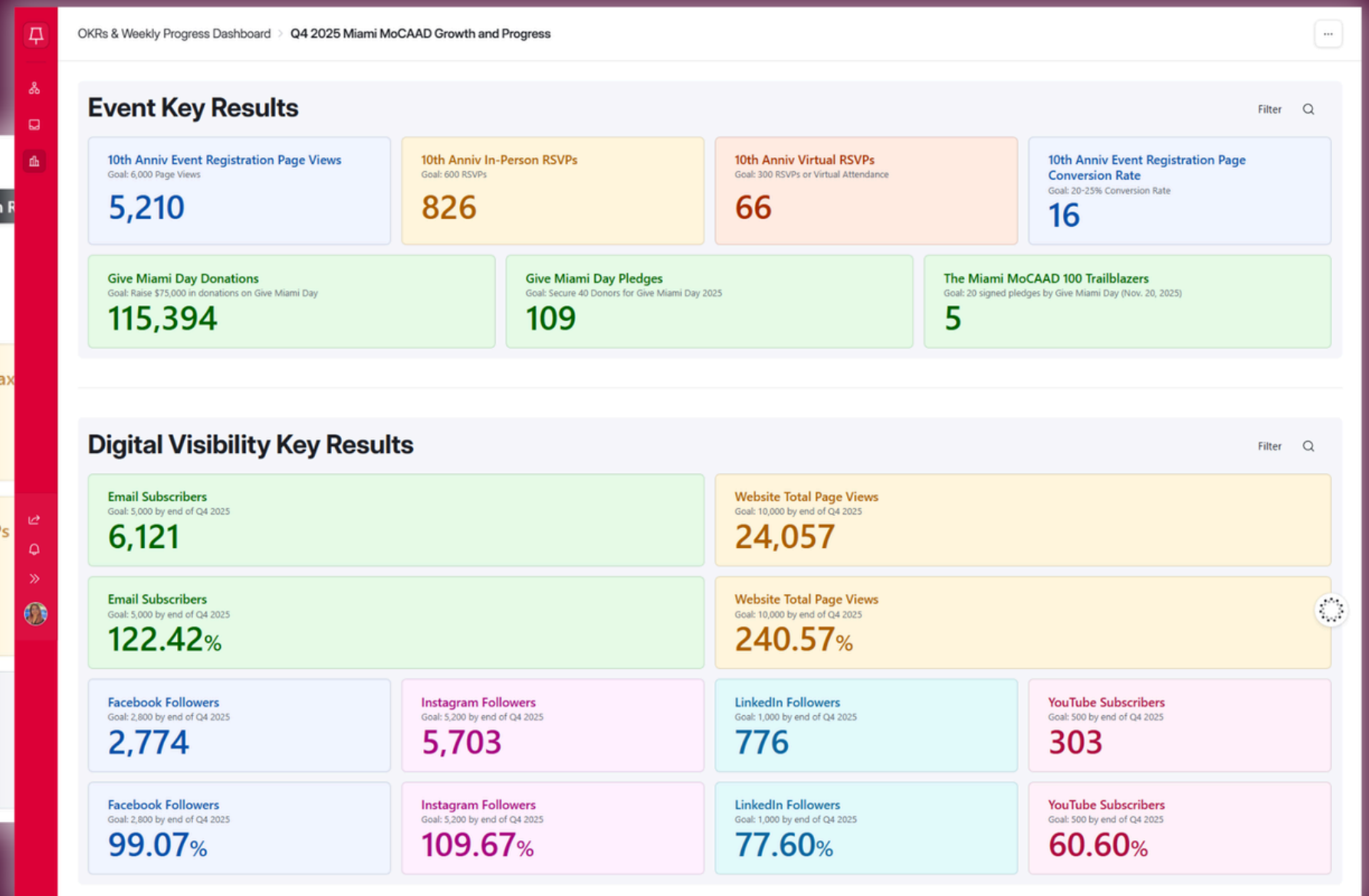
(built in GoHighLevel with Airtable embed)





KPI dashboard examples

(built in Airtable)





Weekly KPI Scorecards

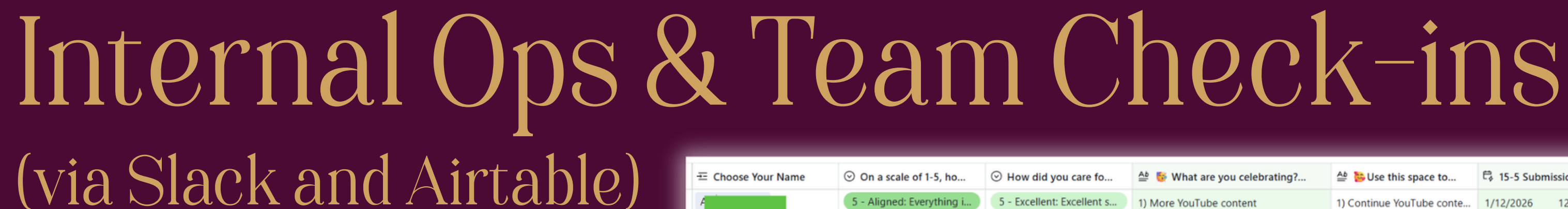
(built in Google Sheets for weekly reporting – with clear red light / green light for easy tracking)

Platform	Team Member	Metrics	Weekly Target	October 2025					
				October 6	October 13	October 20	October 27	AVERAGE	NOTES
LinkedIn	Alyssa	Total Number of Posts	5	5	5	5	5	5.00	
	Alyssa	1x Newsletter Post per week	1	1	1	1	1	1.00	
	Alyssa	Ensure the LinkedIn checklist is followed 100%	1	1	1	1	1	1.00	
	Alyssa/Dale	Average Increase in Followers	10	14	10	12	16	13.00	705 → 721 followers as of 10/27/2025
	Alyssa/Dale	Engagement Rate	2.50%	14.83%	11.53%	6.62%	14.64%	11.91%	
YouTube	Alyssa/Dale	New YouTube Subscribers	5	5	5	5	0	3.8	275 → 275 subscribers
	Alyssa	Video Publishing Frequency	6	6	6	6	6	6.0	
	Alyssa	Ensure the YouTube checklist is followed 100%	1	1	1	1	1	1.0	
	Alyssa/Dale	YouTube Watch Time (Hours)	5	3.4	1.5	2	1.1	2.0	
	Alyssa	Peer Channel Review	1	1	1	1	1	1	
Email	Ghie	Email Open Rate	41.83%	53.52%	47.83%	46.89%	45.92%	48.54%	1,256 / 2,735
	Ghie	Ensure the email checklist is followed 100%	1	1	1	1	1	1	
	Ghie	Raw Clicks	100	196	174	50	125	136	
	Ghie	Click Through Rate	3.41%	7.11%	6.33%	1.83%	4.57%	4.96%	
	Ghie	New Email Subscribers	7	8	5	39	59	28	4,701 → 4,760 contacts as of 10/28/2025
	Ghie	Average Unsubscribe Rate	-0.18%	0.07%	0.19%	0.19%	0.10%	0.14%	
	Ghie	Average Bounce Rate	-0.15%	0.18%	0.07%	0.14%	0.03%	0.11%	
Lead Magnet: 10 Artists to Watch in 2025	Tays	Lead Magnet Page Views (Home Page)	100	0	152	239	287	170	
	Tays	Lead Magnet Page Views (Landing Page)	100	13	4	28	65	28	
	Ghie	Lead Magnet Sign Ups / Downloads	7	5	4	29	56	24	117 Artist Guide overall downloads
	Ghie	Lead Magnet Opt-In Page Conversion Rate	7%	38.46%	100.00%	103.57%	86.15%	82.05%	



OKRs Tracking & Gap Analysis

A	Key Result	A Bas...	# Goal	# Actual	f _x Gap	f _x Progress Bar
OKR CATEGORY						
Social Media Channel		5	∨ Sum 9,600	∨ Sum 9,639	∨ Sum 39	∨ Avg 85.99%
1	⊞ Achieve 500 YouTube Subscribers by the end of Q4 2025 (baseline: 261).	261	500	303	-197	<div><div></div></div> 60.60%
1	⊞ Achieve 100 YouTube Watch Time (hours) by the end of Q4 2025 (baseline: 4...	45	100	83	-17	<div><div></div></div> 83.00%
	Achieve 1,000 LinkedIn Followers by the end of Q4 2025 (baseline: 669).	669	1,000	776	-224	<div><div></div></div> 77.60%
	Achieve 2,800 Facebook Followers by the end of Q4 2025 (baseline: 2,415).	2,415	2,800	2,774	-26	<div><div></div></div> 99.07%
	Achieve 5,200 Instagram Followers by the end of Q4 2025 (baseline: 4,831).	4,831	5,200	5,703	503	<div><div></div></div> 109.67%
OKR CATEGORY						
Email Marketing Channel		3	∨ Sum 5,140	∨ Sum 6,268	∨ Sum 1,128	∨ Avg 110.81%
1	⊞ Achieve 5,000 Email Subscribers by the end of Q4 2025 (baseline: 4,649).	4,649	5,000	6,121	1,121	<div><div></div></div> 122.42%
	Achieve 40% Average Open Rate by the end of Q4 2025 (baseline: 50%).	50%	40	42	2	<div><div></div></div> 105.00%
	Achieve an Average of 100 Email Raw Clicks by the end of Q4 2025 (baseline:...	100	100	105	5	<div><div></div></div> 105.00%
OKR CATEGORY						
Website Channel		4	∨ Sum 17,088	∨ Sum 26,104	∨ Sum 9,016	∨ Avg 73.11%
	Achieve 10,000 Website Total Page Views by the end of Q4 2025 (baseline: 9,...	9,559	10,000	24,057	14,057	<div><div></div></div> 240.57%
	Achieve 7,000 Website Organic Search Traffic by the end of Q4 2025 (baselin...	1,724	7,000	2,028	-4,972	<div><div></div></div> 28.97%



Daily End-of-Day Check-in via Slack

Performance Review Form

Vacation Form

15-5 Weekly Form Submission

Team Onboarding Form



Systems Implementation

IF

Customer buys product
MBA Upsell \$44/mo at price point 4

AND

Contact has tag
Buyers KK Credit 1H-Active

All time This rule has been executed 0 times | [Reset stats](#)

THEN

Assign tag
Buyers MBA44-BOGO

IF

Customer buys product
MBA Upsell \$44/mo at price point 4

AND

Contact has tag
Buyers AI Your Inbox 1H-Active

All time This rule has been executed 0 times | [Reset stats](#)

THEN

Assign tag
Buyers MBA44-AYI

Kartra Automations

IF

Customer buys product
[Special Pays] Success w Soul at price point 55

THEN

Assign tag
Buyers MBA Pay in Full

AND

Cancel subscription for product
MBA Upsell \$44/mo at price point 4

AND

Unsubscribe from sequence
MBA Failed Payment Recovery

AND

Grant access to
Mindful Business Academy for level Pay In Full Bor

AND

Subscribe contact to calendar
Launch Lab [Monthly Reminders] class Launch Lab

IF

Customer cancels subscription
MBA BFCM2025 at Any price point

AND

Revoke access to
The \$1K/Day Experiment for level All access levels

AND

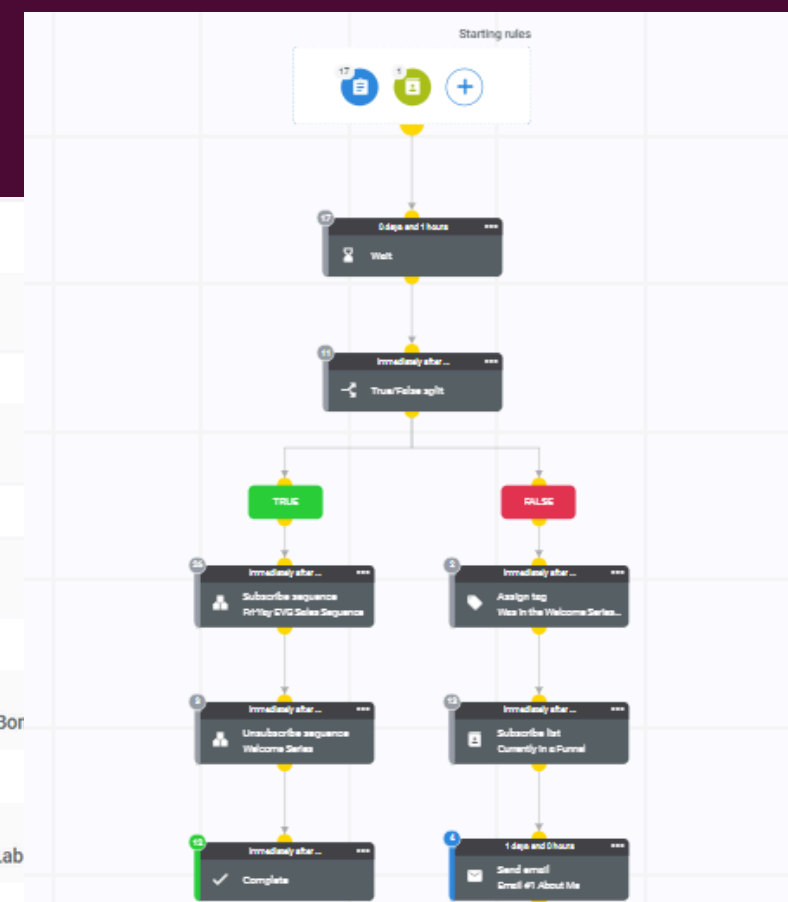
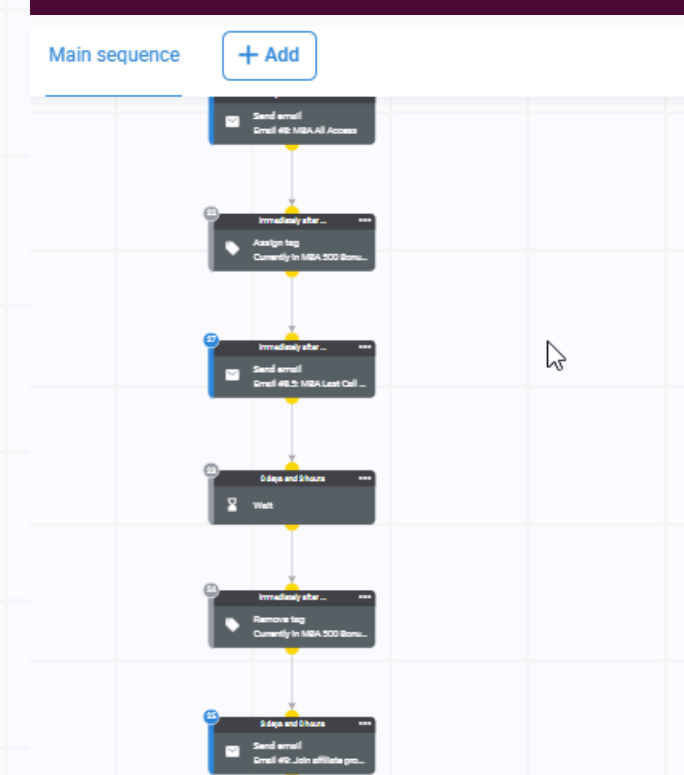
Revoke access to
The Room Weekly Calls for level All access levels

AND

Assign tag
MBA Failed Payment

All time This rule has been executed 1 times | [Reset stats](#)

Active



Welcome Series

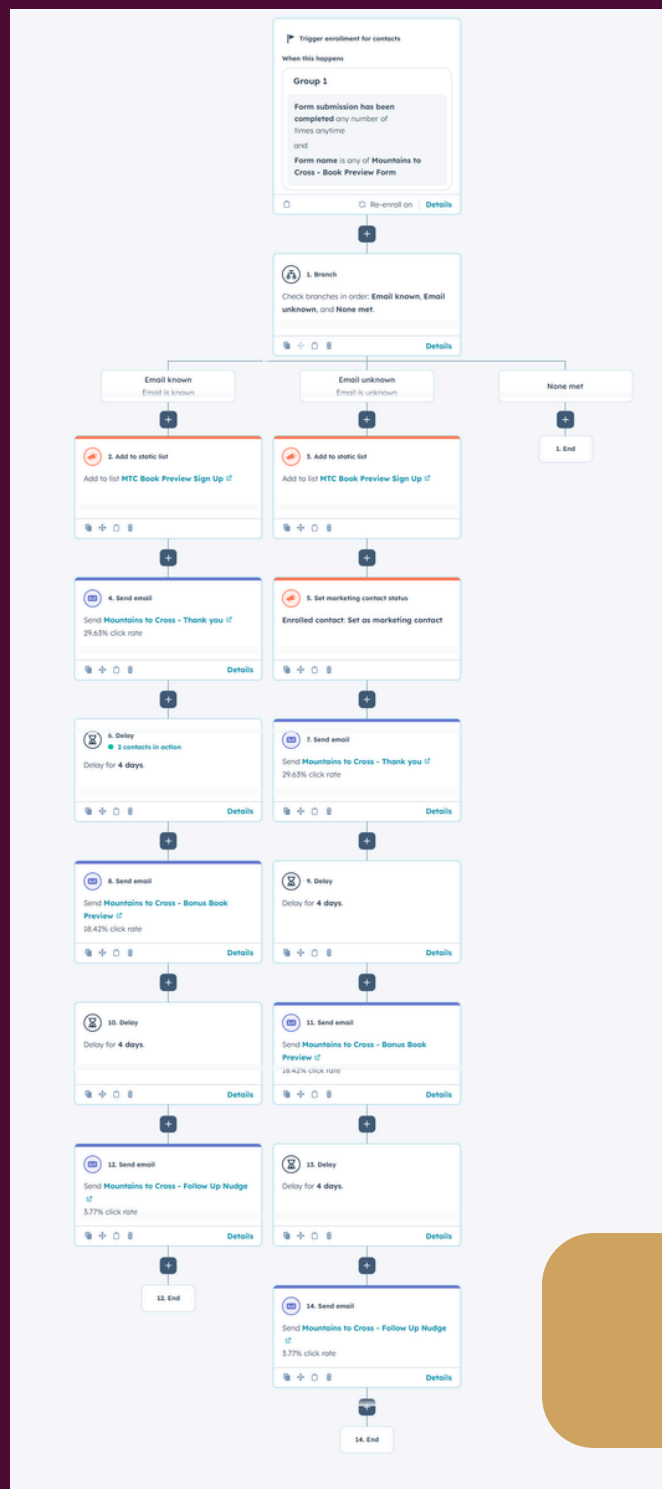
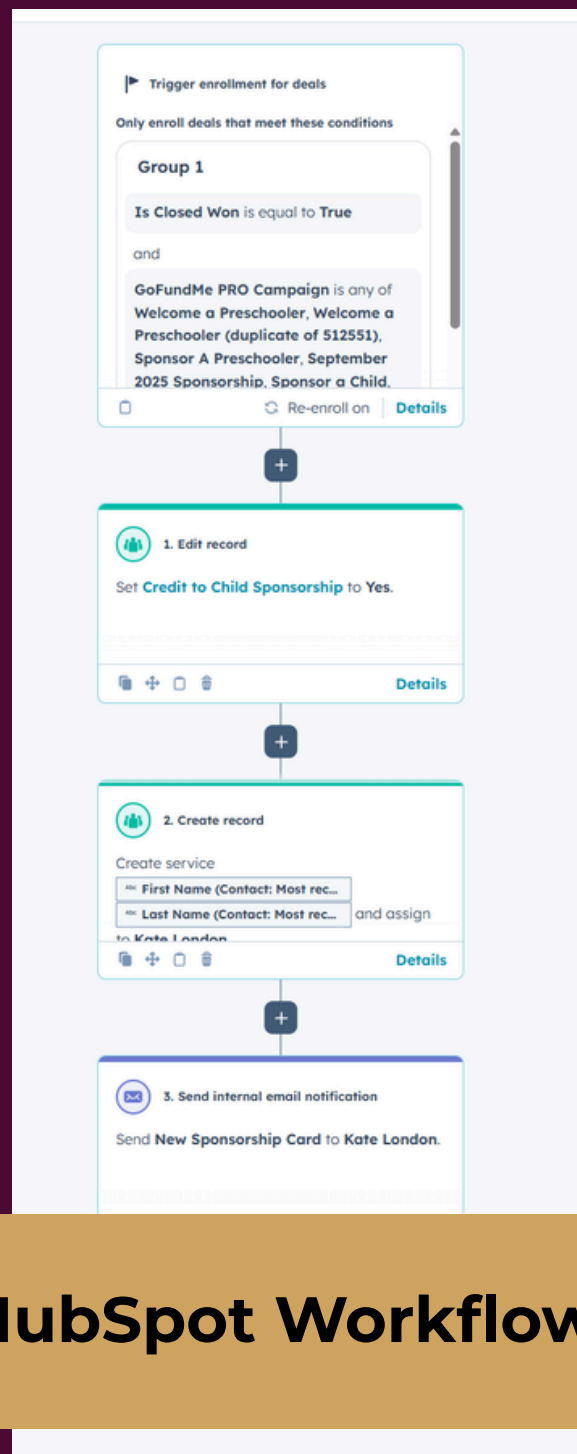
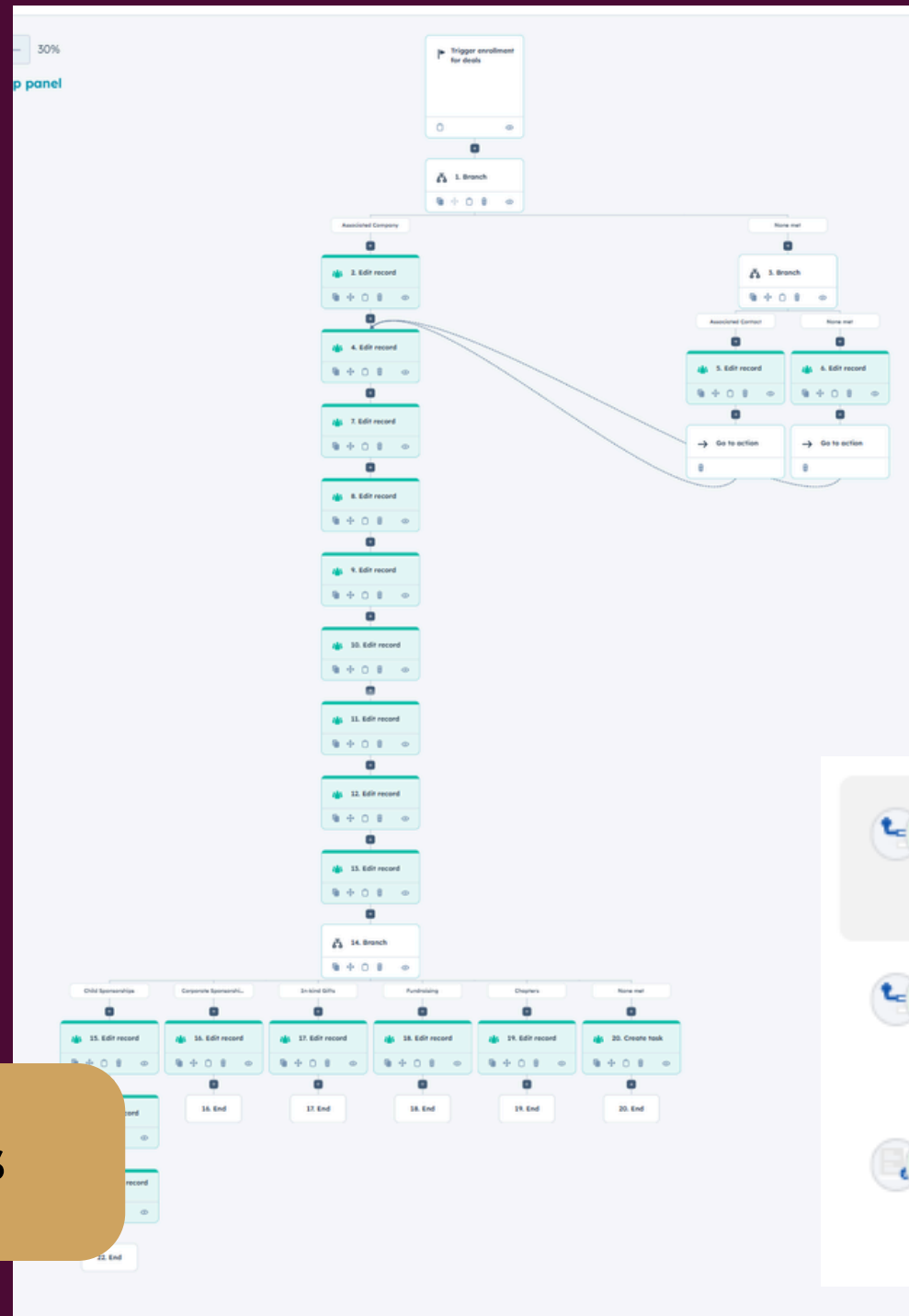
Success with Soul Welcome

24,204 615 175,647

Kartra Sequence



Systems Implementation



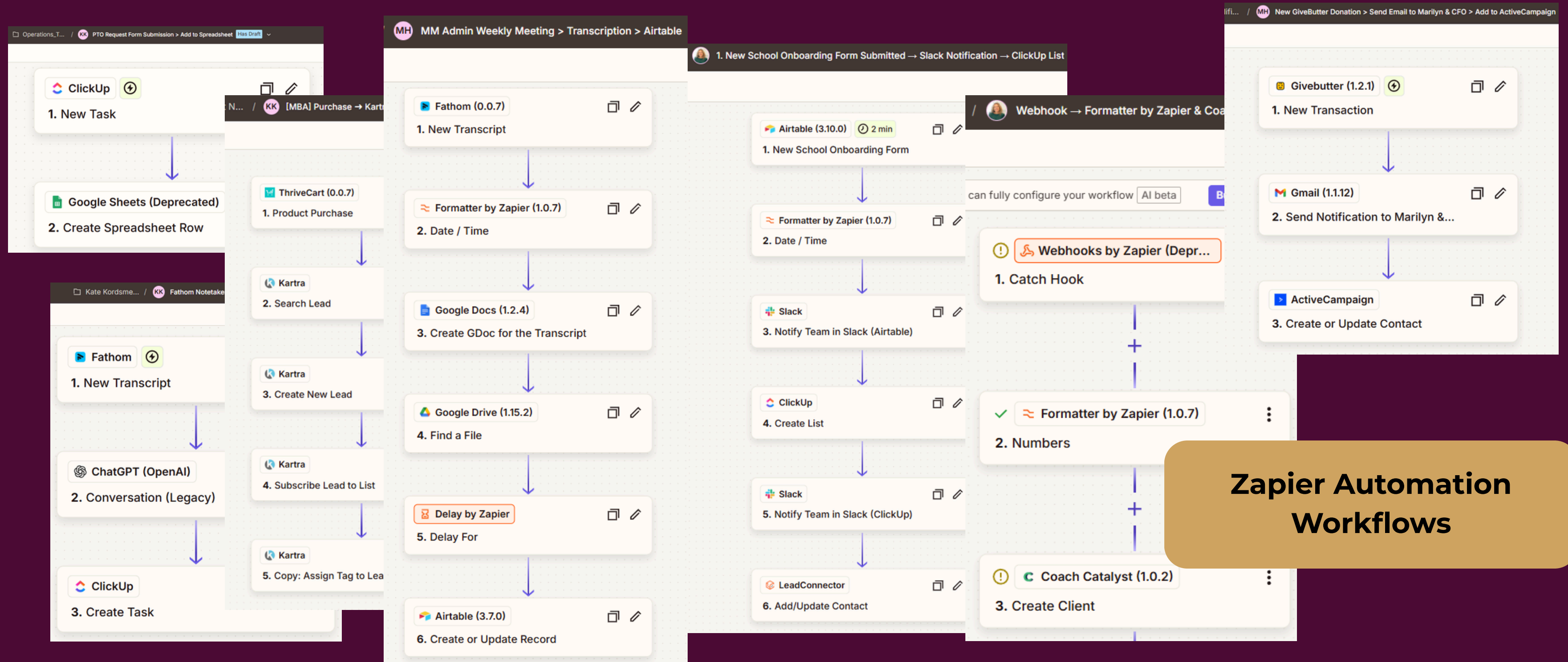
-  Send meeting recap to MM team after each meeting
When a record matches conditions, send an email, and...
-  Weekly Digest (manual send)
When a record matches conditions, send an email, and...
-  Admin Weekly Meeting Reminder (manual send)
When a record matches conditions, send an email, and...
-  OOO Notice - Send to Admins + Managers
When a form is submitted, send an email

Airtable Automations

- | Automation | Automation Status |
|--|-------------------|
|  Add Ticket Type (GA-in person)
When a record matches conditions, update a record | ON |
|  Add Ticket Type (GA-virtual)
When a record matches conditions, update a record | ON |
|  [Soul Basel 2024] Form Submitted > Walk-in Attendee
When a form is submitted, update a record | ON |



Systems + AI Adoption Workflows





Systems Implementation

