



EXECUTIVE SYSTEMS IN A BOX™

THE COMPLETE EXECUTIVE OPERATING SYSTEM

This is your complete system for back office and leadership operating system - giving you the structure, tools and confidence to lead with focus, run your business efficiently and scale with ease.



Proven Systems
Built by experts.
Tested with high performing executives



Maximum Efficiency
Streamline operations, eliminate bottlenecks and save hours every week



Strong Leadership
Create accountability, clarity and consistency across departments and your organization



Growth
Scalable systems that support your organization now and in the future

EVERY AREA. EVERY PROCESS. COVERED.

Executive in a Box includes complete Standard Operating Procedures for every critical stage of your business.

Leadership & Strategy

Vision and goal planning, execution framework

Operations & Workflows

Documented processes that create consistency

Team Roles & Accountability

Role clarity, responsibilities and RACI frameworks

Meetings & Communication

Agendas, reports, follow-up's and communication

Time & Priority Management

Time blocking, priority frameworks and focus strategy

Document & File Management

Naming conventions, file organization and storage standards

Financial Systems

Budgeting, expense tracking, invoice process, financial dashboard systems

Admin Systems

Reporting, business operations, digital workplace organization

KPIs & Performance

Key metrics, and performance review processes

Risk & Compliance Management

Risk assessments, policies, compliance and data security

Client & Customer Management

Client journey mapping and service delivery standards

Sales & Business Development

Sales processes, lead management, follow up cadence

TOOLS THAT EMPOWER.

TEMPLATES THAT DELIVER.

Professionally written scripts, templates and resources to run your business with clarity

Checklists & SOPs

Step by step checklists and SOPs for every process department

Scripts & Communications

Email, phone and meeting scripts for every internal and external interaction

Resource Library

Editable templates, guides and resources you can use immediately

Onboarding & Training

New hire onboarding plans, training guides and role playbooks

Document Templates

Proposals, reports, plans, policies, agreements and more

Automation Workflows

Pre-built automations and workflows to save time and reduce manual work

Dashboard & Tools

Custom dashboards, trackers and tools to monitor and improve

Custom To Your Store

Every system is tailored to your business, goals, team and industry

PROCESSES THAT CREATE CONSISTENT CONSISTENCY THAT DRIVES RESULTS.

ONE TIME INVESTMENT

\$2,099

One complete system built exclusively for your business.

BUILT FOR RESULTS BACKED BY PURPOSE

We are not here to hand you a binder. We are here to build a system that gives you back time, empowers your team and drives measurable growth



Strategy & Planning

Business planning, quarterly planning, OKRs and execution roadmaps



SOPs & Workflows

Step by step SOPs and workflows for every process throughout your business



Training & Development

Training guides, coaching tools and employee development plans



Technology & Automation

Recommended tech stack, done for you automations and integrations



Risk Compliance

Policies, procedures and compliance management throughout



KPIs & Dashboards

Track, measure and improve performance across all areas in your business



QA & Accountability

Scorecards, audits and accountability tools to ensure consistency in all areas



Communication Standards

Internal and external communication frameworks, templates and standards

YOUR JOURNEY. 30 DAYS TO TRANSFORMATION

1

SUBMIT APPLICATION

Tell us about your business and your goals

2

APPLICATION REVIEW

We'll review and schedule a strategy call with you

3

SECURE YOUR BUILD

Investment received. Your production is reserved

4

WE BUILD (30 DAYS)

We create a fully custom executive operating system

5

LAUNCH WITH CONFIDENCE

We deliver. You implement and continue to grow

LIMITED SPOTS. MAXIMUM IMPACT.

Applications are now open.

Because every system is built specifically for each business, we accept a limited number of projects at a time.

APPLY TODAY TO SECURE YOUR SPOT

Let us build your system. Your advantage starts now.

WHAT IS INCLUDED

Executive in a box includes complete Standard Operating Procedures for every critical stage of the customer journey.

✓ Leadership & Business Strategy

Executive Business Audit
Vision & Strategic Planning Framework
Annual Business Roadmap
Leadership Accountability System
Business Growth Blueprint
Business Operations Playbook
Delegation Framework

✓ Scripts & Templates

Department SOP Templates
Weekly Planning Templates
Phone / Email / Text Scripts
Job Description Templates
Onboarding Plans
Budget Planning Templates
Expense Tracking
Communication Scripts

✓ Standard Operating Procedures (SOPs)

SOP Development Guide
Workflow Mapping
Quality Control Procedures
Project Intake Process
Deadline Tracking
Executive Time Audit
Meeting Frameworks
Decision Logs
AI Workflow
Productivity Automations
Digital Organization
Hiring Process Framework
Coaching Frameworks
Client Journey
Client Satisfaction
Client Retention
KPI Reporting

AND
MORE...