

Publishing Pod Handoff

Everything I designed, built, and had in flight, in one place and in the order to use it. Written for whoever takes the seat next, so the system can be implemented without me in the room.

Prepared by **Brycen Coffman** Date **September 2026** Covers **Aug 17 to Sep 1, 2026** Status **Final handoff**

SLACK STANDARD	MEETING CADENCE	CLICKUP (POD OS)	ROAN TRACKER	LAUNCHES
Approved v3 not rolled out	Frozen v1.3 not running yet	Designed build not started	Google Sheet live	Ariel Sep 7 · Justin Sep 24 in flight

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Read this first

I left the seat on September 1. This is the handoff. It pulls together the four operating documents I built (Slack, meeting cadence, ClickUp, rollout), the interviews I ran with the team, and the launches that were in motion when I left, so you can pick it up and run it.

Two things matter more than everything else in here.

THE ONE NON-NEGOTIABLE

The system only works if the team works the system, every single day. Nothing in this document executes itself. ClickUp is only true if people update it when reality changes. Slack only stays findable if every request carries a link and every decision gets sealed. Meetings only stay short if the pre-read gets done.

Whoever holds this seat has one job in the first 30 days that outranks all the others: hold the standard daily, with fast feedback loops, until it is habit. Section 07 spells that job out. Adherence is leadership's responsibility, not the team's good intentions.

THE SECOND THING

Prove it on one creator before you clone it. The whole design assumes a 30-day pilot on one company before it rolls to anyone else. The pull to run everything everywhere at once is strong here. Section 11 is my honest read on why resisting it matters.

How this document is organized

SECTIONS	WHAT THEY GIVE YOU
01	What exists today and its status as of September 1
02 to 05	The operating system, condensed enough to run from. The full documents (section 12) hold the build-level detail: exact ClickUp fields, every status definition, 35 routed Slack examples
06 to 07	The 30-day rollout, the decisions Adura needs to make before Day 1, and the enforcement loop that keeps it alive
08 to 10	The people, the work in flight, and the numbers the team has asked for
11	My opinion on focus and sequencing. Clearly marked as opinion
12 to 13	The file index and a first-30-days checklist
14	The Google Drive standard and the paste-ready cleanup prompt

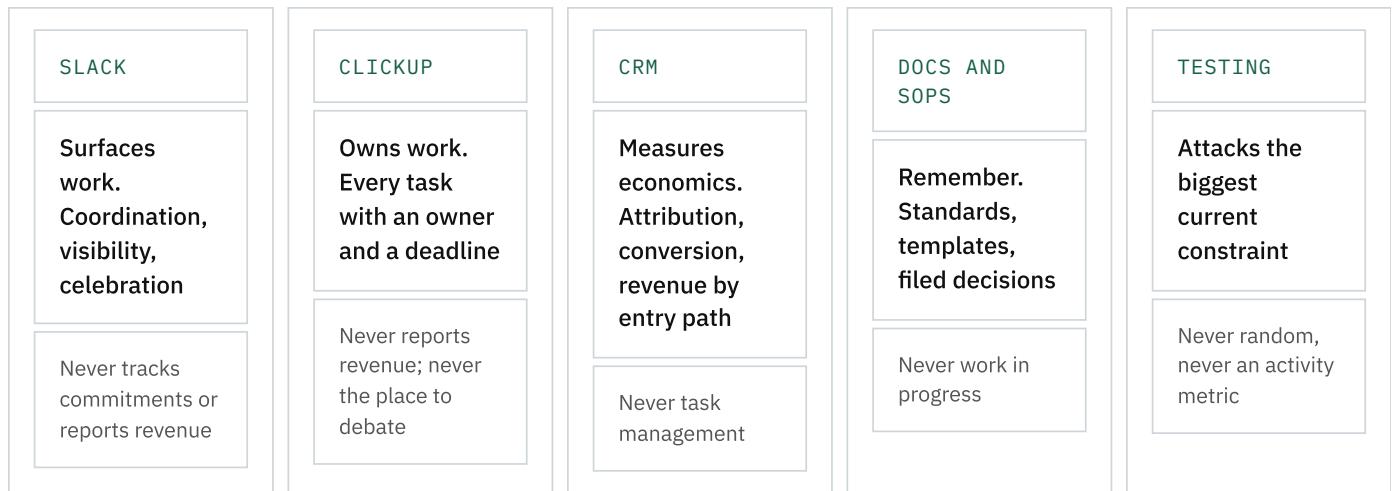
State of play

Status is as of my exit on September 1. Anything marked in flight has moved since; confirm current state with Hamza and Marenti before you act on it.

ITEM	WHAT IT IS	STATUS	FILE
Pod Slack Blueprint v3	19 standing channels in four groups, one routing rule, five message labels, automated sales feed, one-week rollout	approved standard rollout not started	Pod-Slack-Blueprint.pdf
Pod Operating Rhythm v1.3	Meeting cadence: monthly allocate, Monday live, Friday async report, ClickUp daily, short bursts during launches, AAR after every launch	frozen standard not yet running	Pod-Operating-Rhythm.pdf
Pod OS ClickUp Blueprint	Three spaces, the field model, status dictionary, launch runbook template, partner content pipeline, constraint-driven testing, the Roan pilot spec	designed build not started	Pod-OS-ClickUp-Blueprint.pdf
Pod Implementation Guide	Build manual for the system owner: exact checklists, channel rename map, ClickUp fields and statuses, decision flags D1 to D8, Day-30 gate	final	Pod-Implementation-Guide.pdf
Pod Rollout Playbook	Leadership training: decision tree, routed examples, enforcement standards, announcement copy, five-minute Loom script, acknowledgment checklist	final	Pod-Rollout-Playbook.pdf
Roan Performance Tracker	Google Sheet: daily entry for both funnels, deals ledger, cohort payback, rep report, automatic biggest-constraint diagnosis	live seeded with sample data, waiting on real numbers	Google Sheet (section 12)
Marketing Command Calendar	Static planning prototype: one-page view of launches, gates, sequences, and tests across creators. Not connected to ClickUp	prototype Ariel and Justin dates from the briefs; everything else illustrative	Shareable page (section 12)
Ariel: Personal Brand Playbook	\$27 front end, three bumps, Toolkit upgrade. Launch Sep 7. Project brief plus a full ClickUp task breakdown	in flight was in Build phase at exit	ariel-pbp folder
Justin: 10M Shares Playbook	\$27 front end, three bumps, \$197 Pack with \$97 downsell. Kickoff Sep 3, launch Sep 24. Brief, tasks, copywriter brief, voice spec, sales page v3	in flight was in Plan phase at exit	justin-10m-shares folder
Chris Jefferson	CRO real estate offer. Hamza was onboarding him, one to two week scope	in flight no documents from me	none
Week-1 audit and build plan	Seven gaps, 17 builds, sent to Adura Aug 20. What got built is in section 09	partially built	Week-1-Audit-Build-Plan.pdf
Pod structure	Three phases, five creators per pod, event-based hiring triggers, shared central teams with stable assignments	presented Jul 31	Pod-Structure-Creator-Monetization.pdf
Marketing vision and values; Director 4R	Purpose, BHAG, five core values, how we win; role, responsibilities, results, requirements. Bracketed numbers were never locked	drafts	two .md files

The system on one page

The five documents describe one system. Each tool has one job, and the boundaries are what keep it usable.



The chain: Slack surfaces it, ClickUp owns it, the CRM measures it, documentation remembers it.

Six rules that carry everything else

1. **Owner plus deadline means it lives in ClickUp, or it does not exist.** Every task leaves a meeting with a Who, a What, a definition of Done, and a When. Tasks are assigned to a person, never to the room.
2. **Send every message to the smallest room that contains everyone required to act.** That one sentence is the whole Slack system. The channel map is the lookup table for it.
3. **Meetings do five jobs: allocate, commit, unblock, learn, develop people.** Status transfer is not on the list. Status lives in ClickUp. If a meeting is needed to find out what is happening, the fix is ClickUp accuracy, not another meeting.
4. **Every meeting output is a decision, a commitment, a blocker escalation, a documented learning, or individual development.** A decision that is not a ClickUp task did not happen.
5. **We are always testing, never randomly.** Every test attacks the named biggest constraint. One primary constraint per company per week.
6. **Accuracy, not activity.** Update a ClickUp task when its status, owner, due date, blocker, or next action changes. Every active task is accurate by end of day. No update is required when nothing changed.

THE ONE TEST THE WHOLE SYSTEM HAS TO PASS

Can a new hire find the right conversation, its owner, the decision, and the next action in under two minutes? Every rule exists to make the answer yes. Anything that stops serving that test gets cut at the next audit.

Each creator is an operating company

Roan, Ariel, and Justin are each treated as a business unit with its own offers and acquisition paths. Their funnels never become Slack channels or ClickUp folders. A webinar and a workshop that both book a call are two ways into one core offer, not two businesses. The \$27 products are attraction offers whose job is to create a customer and walk them toward the core offer. Every delivery and production task carries three fields: **Offer** (what the task supports), **Entry Path** (how the prospect arrived), and **Ascension Target** (what this path is designed to create next).

Meeting cadence

Source: Pod Operating Rhythm v1.3, frozen, with one amendment made in this handoff: Friday runs as an async report or Loom by default (see "Live or async" below). Async by default, synchronous on purpose. Monthly we allocate, weekly we commit and inspect, daily we keep ClickUp accurate, and during launches we spike into short bursts. Tuesday through Thursday are meeting-free by default, and that is defended on purpose.

All three team members asked, unprompted, for fewer, shorter, better-prepared meetings (section 08). This cadence is the answer. Use ClickUp for daily visibility and exception huddles for unresolved blockers, not a standing daily call.

The rhythm at a glance

RITUAL	WHEN	LENGTH	WHO	JOB
Monthly Growth Review	First week of the month	90 min	Leadership, cap 7	Allocate people, money, attention, launch capacity. Name the portfolio and company constraints
Quarterly strategy block	Every third Growth Review	+30 to 45 min	Leadership	Creator portfolio, pricing, hiring triggers, pod capacity. No new standing meeting
Weekly Game Plan	Monday AM	45 min	One rep per active function plus pod leads	Convert priorities into owned commitments. Select the one constraint attacked this week
Ship and Learn	Friday, async by default: end-of-week report or Loom per function by 3pm CT	Under 5 min each	Function reps report; the pod lead decides	What shipped, what slipped and why, ads in Analyzing, concluded tests, next constraint. Live only when a decision needs discussion
1:1s	Weekly core, biweekly stable contractors; batched Monday afternoon	20 to 25 min	Manager and each report	Development, friction, recognition. Never status; the manager checks ClickUp first
Hygiene audit	Weekly, async	10 to 15 min	System owner	ClickUp truth check: stale statuses, empty fields, overdue without comment, commitments living in Slack
Daily ClickUp updates	Daily, async	none	Everyone	Statuses, blockers, next actions current. Slack only when coordination demands it
Exception huddle	Triggered only	10 min	Only those needed	Resolve what async could not. The unresolved issue is the trigger, not the launch existing
Launch-week standup	Daily in launch week, 9:30 CT	10 min	Launch team	What changed, what is blocked, what ships today, who owns each action. Ends at cart close
Launch AAR	Within 5 days of cart close	45 to 60 min	Everyone on the launch	Plan vs actual, why, keep/change/stop, SOP updates, next launch constraint
Creator cadence	Weekly async plus a monthly call	30 min call	Growth Lead and creator	Wins, the numbers that matter, a "needs from you" list where every item has a deadline

Standing live load: 45 minutes of weekly sync per person (Monday) plus a 20-to-25 minute 1:1. Friday is a report or Loom under five minutes. Launch weeks add five 10-minute standups. Exception huddles can land any day; they need a trigger, not a slot.

Live or async

The test for each ritual: does its output need a conversation to produce? Commitments, allocation decisions, structured debriefs, and 1:1s do. Inspection, status, and reporting do not. Live is reserved for the first group.

RITUAL	DEFAULT FORMAT	WHY	IF YOU CAN'T MAKE IT
Monthly Growth Review	Live, 90 min	Allocation decisions need the people who control the resources in one room	The pre-read is async anyway. A missing leader sends their allocation recommendation in writing before the meeting
Weekly Game Plan, Monday	Live, 45 min	Commitments get made out loud. "So you're good to finish this by Thursday?" is the point of the meeting	Post a Loom or written [UPDATE] before the meeting with your commitments and blockers, with ClickUp already current. The pod lead assigns in your absence
Ship and Learn, Friday	Async by default: end-of-week report or Loom per function by 3pm CT	It is inspection, not negotiation. The decision is the output, not the discussion	Go live only when a decision needs discussion, for example a kill-or-scale disagreement: a 15-minute triggered huddle, never a standing slot
1:1s	Live: video, phone, or a walk	Development and friction do not transfer over Loom	Reschedule within the same or following week. Never replace with a written update
Daily	Async, ClickUp	Status lives in the system of record	Not applicable
Exception huddle	Live, 10 min, triggered	It exists because async already failed	Only those needed attend; if you are needed, you attend
Launch-week standup	Live, 10 min, 9:30 CT	Speed of coordination during a live launch	Post a Loom answering the four questions before 9:30am CT; if your shift starts later, post it by the end of your previous shift. The launch owner incorporates it into the standup and posts the daily [UPDATE]
Launch AAR	Live, 45 to 60 min	Keep, change, and stop items get owners in the room	Numbers are pre-read async. Attendance is required for the launch team
Creator weekly	Async: written report or Loom in the -comms channel	Wins, numbers, needs-from-you with deadlines	Not applicable
Creator monthly	Live, 30 min	Performance, next month's plan, strategic asks	Replace only if launch touchpoints cover all three

THE LOOM RULE

A Loom replaces attendance, never the output. It runs under five minutes, is posted in the relevant channel with a label, answers the same questions the meeting would ask, and gets a written reply with decisions from the meeting owner the same day. Commitments still land in ClickUp. For async rituals, rule R3 reads: decisions land in ClickUp the same day, not "before the meeting ends."

Meeting specs, condensed

Monthly Growth Review • 90 min • leadership, cap 7

- Pre-read frozen 24 hours before, read before arrival: scoreboard by creator and offer path (revenue, gross profit, cash collected, customers), input metrics with 6 to 12 week trends, fulfillment capacity, active launches, concluded experiments.
- Agenda: scoreboard exceptions only (10), company review Roan / Ariel / Justin with Health On Track / At Risk / Blocked (20), constraint review naming the portfolio constraint and each company constraint with evidence and cost (20), resource allocation (25), next-month commitments (15).
- Output: a written decision per creator and per major initiative, one of Continue, Increase, Fix, Pause, Stop, each with a named owner. No meeting ends without resource decisions.

Weekly Game Plan • Monday • 45 min

- Runs directly from the This Week view in ClickUp. Walk This Week, clear Overdue, milestone-check launches inside 21 days, confirm Health on each active campaign, confirm ad batch and design priorities.

- Select the one primary constraint per company being attacked this week: what evidence, what action, who owns it, when we decide, what result would change direction. Secondary constraints go to the backlog unless they threaten delivery.
- Output: every priority has one owner, one due date, a definition of done, a ClickUp task, and a success metric. Required question: which constraint is this week's work designed to remove?

Ship and Learn · Friday · async by default

- Each function rep posts an end-of-week report, a written [UPDATE] or a Loom under five minutes, in their team channel by 3pm CT: what shipped and what slipped, and why; ads in Analyzing with a scale, iterate, conclude, or kill recommendation; concluded experiments with the learning; design queue status; the next constraint.
- The pod lead posts the decisions the same day ([DECISION] in Slack, filed in ClickUp), updates the scorecards, and carries the named constraint into Monday.
- Go live only when a decision needs discussion. That is a 15-minute triggered huddle with the people involved, not a standing meeting. If Friday decisions keep needing a room, fold them into Monday rather than adding a standing Friday slot.

1:1s · weekly · 20 to 25 min

- The report owns the agenda. Standing prompts: what is harder than it should be, where do you need a decision from me, what are you learning, how is the workload actually feeling. Name one specific thing they did well and why it mattered.
- Cancel only by mutual agreement, and reschedule within the same or following week. Never a task-status review.

Daily · async · everyone

- No standing daily meeting and no mandatory daily Slack post. ClickUp is the daily written status system. Work runs from My Tasks; blockers are comments with the person who can unblock tagged.
- Slack posts only for a blocker, a decision, or coordination ClickUp cannot carry. Urgent blockers use [BLOCKER] with a 60-minute response bar inside coverage hours.
- Launch weeks: keep ClickUp accurate as usual, and add the 10-minute standup plus the launch owner's one daily [UPDATE] in the launch channel.

Launch After-Action Review · within 5 days of cart close

- Structure: what was the plan, what actually happened (numbers on the table), why the gaps, what we keep, change, or stop, which SOPs and templates get updated and who owns each.
- Required output, every AAR: 3 keep, 3 change, 3 stop. Every change and stop item becomes a ClickUp task with an owner and a due date before the AAR closes. Learnings filed, runbook updated, launch channel archived. "Great discussion" is not an output.

Creator cadence

- Weekly async report in the creator's comms channel: wins, the numbers that matter, and a needs-from-you list with deadlines. Anything in WAITING with Waiting on = Creator for 48 hours or more is surfaced in it.
- Monthly 30-minute call: performance, next month's plan, strategic asks. In a launch month it may be replaced only if launch touchpoints cover all three.

Three levels of constraint

LEVEL	MEANING	WHO OWNS IT
Portfolio	The biggest issue limiting the publishing business overall	Named and reviewed monthly by leadership
Company	The biggest issue limiting Roan, Ariel, or Justin individually	Named monthly, executed against weekly
Launch	The biggest issue threatening a specific campaign	Named weekly and during launch, closed at the AAR

Leadership allocates against portfolio and company constraints. The weekly team executes against company and launch constraints. Monday selects the one being attacked. Five "biggest" constraints means nothing is prioritized.

Operating rules

- R1** **Agenda or cancel, for scheduled meetings.** No agenda 24 hours out, no meeting. Pre-read incomplete 24 hours out, the owner completes it or cancels. Exception huddles use the triggering blocker as their agenda; launch standups use the four standing questions.
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- R2** **No required output, no meeting.** If no decision, commitment, blocker escalation, learning, or individual development is required, cancel it.
-
- R3** **Decisions land in ClickUp before the meeting ends.** Owner, due date, definition of done. Slack gets the [DECISION] pointer.
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- R4** **Attendance follows the work.** Required attendees own commitments, remove blockers, or make decisions that week. Others get the notes. Decision meetings cap at seven.
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- R5** **Tuesday to Thursday are meeting-free by default.** The standing live meeting is Monday; Friday runs as an async report by default.
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- R6** **Every new recurring meeting needs a decision it produces and a sunset date.** Reviewed monthly. The system should make meetings fewer over time.
-
- R7** **No status readouts, ever.** If a meeting is used to find out what is happening, fix ClickUp accuracy.
-
- R8** **Every important topic gets a disposition.** Decide now, assign a next action, defer to a specific date, or remove it. Every disposition has an owner. "We'll think about it" has neither.

Failure modes and guards

WHAT DECAYS	GUARD
Status theater migrates into the weeklies. People read their week aloud	Data is pre-read or on screen from views. Minutes go to exceptions, decisions, constraints. A segment that produced no decision two weeks running gets cut
ClickUp accuracy decays silently. Blockers live in DMs; pressure for a daily meeting returns	The weekly hygiene audit. Findings route to the individual as a direct conversation, not to the team as a new ritual. The daily meeting is the symptom, not the fix
Meeting creep. Every project proposes its own sync	Rule 6. New recurring meetings need a produced decision and a sunset date. The monthly review kills the ones that stopped earning their slot
Launch mode never turns off. The standup survives past cart close	The standup's end date is set when it is created: cart close. The AAR is held separately within five days. After that, daily sync needs a new trigger

Slack

Source: Pod Slack Blueprint v3, approved. The old pattern was two channels per creator and everything else in one shared scroll. Decisions got made and lost, requests got seen and forgotten, and during simultaneous launches the noise multiplied. The fix is one map and one rule.

The short version

- 19 standing channels in four groups (18 if setters fold into sales), plus a temporary channel per live launch. Every channel has one job, one owner, and a pinned note saying what belongs in it.
- Slack is organized by company, function, and temporary initiative. Never per offer, per funnel, or per campaign.
- Top-level messages that create an obligation or record an outcome start with a label: [DECISION] [REQUEST] [BLOCKER] [UPDATE] [LEARNING].
- Sales announce themselves in #sales-feed. Slack shows the win; the CRM is the source of truth; ClickUp owns commitments.
- No history gets lost. Existing channels get renamed into the new map, never recreated.

The channel map

GROUP	CHANNELS	WHO IS IN IT	NEVER FOR
Company	#announcements #kudos #sales-feed #lounge	Everyone. Only leadership posts top-level in #announcements; it is the only channel where @channel is allowed	Discussion in #announcements; sale notifications in #kudos; work requests in #lounge
Creators, two each	#creator-roan and #roan-comms (same pair for Ariel and Justin)	#creator- is the internal war room: strategy, numbers, funnel decisions, debate, execution. The creator is never in it. #-comms is the only room the creator and their people are in: updates, approvals, requests, timelines, one voice	Internal debate, unresolved disagreements, performance issues, comp, sensitive strategy, or blame in a -comms channel. Ever
Launches, temporary	#launch-[creator]-[initiative]-[yyyy-mm]	Everyone working that launch, internal only. Pinned kickoff template. Archived within a week of the post-mortem	External stakeholders; anything after the post-mortem
Central teams	#team-marketing #team-design #team-sales #team-setters #team-ops	Function members plus the people who act with them. Craft and reusable learning across creators. Design requests enter through the form, never DMs	One creator's campaign execution. There is deliberately no #marketing-ariel: it would hold the same people as #creator-ariel
Private	#private-leadership #private-people #private-finance #private-legal	Need-to-know only. Comp, hiring, disputes, deal terms, P&L, contracts	Anything that could be public. Awkward is not the same as sensitive

Channels are named for creators, not pods. A pod will eventually hold five creators, and nothing renames when Pod 2 exists. At two or more pods, craft rooms split by pod (#pod1-marketing), never by creator.

Rule zero: where does this message go?

Send the message to the smallest room that contains everyone required to act. When two rooms fit, prefer the creator or launch channel and drop a link in the team channel if the craft side should see it. "Required to act" is the operative phrase; people who merely find it interesting are not a reason to widen the room.

IF IT IS ABOUT	IT GOES TO
One company's strategy, numbers, cross-funnel decisions	#creator-[name]

IF IT IS ABOUT	IT GOES TO
Anything the creator or their team must see or answer	#[name] - comms
Live campaign coordination for a launch that has a channel	#launch- [name]
Shared craft or reusable learning	#team- [function]
Company-wide information	#announcements
Recognizing a person	#kudos
A sale that just happened	#sales- feed, automated
Comp, hiring, disputes, deal terms, finance, legal	#private- [area]
Anything with an owner and a deadline	ClickUp first, then post the link in the right channel. Commitments never live in threads

The launch bar

A launch earns its own channel only when at least two of these are true: two or more functions must coordinate; there is a hard launch or close date; coordination is needed daily; more than five people are actively contributing; failure creates material revenue or customer impact. Below the bar, it is a pinned thread in the creator channel and tasks in the folder's Ongoing list with the Campaign field set.

Message labels

LABEL	MUST INCLUDE
[DECISION]	The decision, its owner, effective date, what changes, and a link to the ClickUp task, SOP, or brief it updated
[REQUEST]	What, owner, deadline, definition of done, ClickUp link. Missing any of the five, it gets bounced back kindly. No ClickUp link means the work has not started
[BLOCKER]	What is blocked, who can unblock it, cost of waiting. 60-minute response bar during coverage hours on a live launch or customer-facing breakage
[UPDATE]	Status against plan. No response needed
[LEARNING]	What we tried, what happened, what we would change next time

Casual questions and banter need no label. The tag is for messages someone must act on or find later.

House rules, pinned in every channel

1. Threads or it didn't happen.
2. Decisions get sealed, then filed. The Slack message is the pointer; ClickUp, the SOP, or the brief is the truth.
3. Slack surfaces work; ClickUp owns it. Owner plus deadline means it exists in ClickUp or it doesn't exist.
4. @channel in #announcements only. @here only in launch channels during launch week.
5. DMs are for logistics and private matters. Praise in public, critique in private.
6. -comms means outsiders are present. Write like the creator is reading it. They are.
7. Response expectations: coverage hours 9:00am to 6:00pm CT, Monday to Friday. Urgent [BLOCKER] within 60 minutes. -comms same business day. Team and creator channels same day. Outside coverage, tag the launch owner; a blocked launch escalates launch owner, then growth lead, then director.
8. Wrong room? Friendly redirect. Answer, then point to the right channel.

The sales feed

One incoming webhook on #sales-feed, fed by each funnel's payment platform (Whop or Stripe via Zapier, GHL via workflow webhook). Format: \$997 · paid in full · [offer] ·

Creator: Ariel · Closer: Sam · Setter: Dee · Today: \$14,240 . No card data, no customer emails, phones, or full names. Refunds and cancellations post automatically so the feed never reads better than reality. High-ticket posts individually; low-ticket runs in hourly digest during launches. The feed celebrates; the CRM reconciles.

Rollout

Rename, don't recreate: "Roan internal chat" becomes #creator-roan and "Roan comms" becomes #roan-comms, same for Ariel and Justin, so every message and member survives. The day-by-day build and announcement sequence is in section 06: Slack goes live for all three creators on Day 1, the announcement and training land on Day 3, and the Day-30 audit judges friction, not tidiness.

ClickUp and project management

Source: Pod OS ClickUp Blueprint (Aug 30) plus the Implementation Guide. ClickUp is one tool in the system, not the system. Shared craft lives in central queues, company strategy and campaign coordination live in creator folders, campaign work lives in a temporary launch list, and acquisition paths are fields, not folders. The whole standard gets proven on one company for 30 days before it touches anyone else.

The shape: one workspace, three spaces

SPACE	CONTAINS	JOB
HQ	Meetings & Agendas · Offers Registry · Issues & Decisions · Scorecards · Docs (SOPs and the template index)	The company operating layer: decisions, standards, scorecards, the offer catalog
PODS	One folder per creator: a pinned hub doc, Ongoing, temporary campaign lists, Backlog & Ideas. Roan first; Ariel and Justin get stamped after the pilot passes	Each business unit's work, ongoing and campaign
PRODUCTION	Ads Engine · Design Studio · Partner Content Queue · Split Test Lab	Shared craft queues serving every creator. A designer looks at one queue, not seven folders

Where work goes: clears the launch bar in section 04, a temporary campaign list; dated work below the bar stays in Ongoing with Campaign/Launch set. Repeats indefinitely, Ongoing. Shared craft with a standardized process, the Production queue that owns that workflow. A one-off idea with no committed date, Backlog & Ideas. Do not create a campaign list for every recurring activity.

The field model

Three fields describe the money model on every piece of delivery and production work. Offer is what the task directly supports. Entry Path is how the prospect enters (single-select; Multi-path when genuinely shared, never comma-separated). Ascension Target is what this path is designed to create next, and empty is a valid answer.

ROAN TASK	OFFER	ENTRY PATH	ASCENSION TARGET
Blueprint checkout page	\$27 Blueprint	\$27 Blueprint	Booked-call offer
Webinar emails	Booked-call offer	Webinar	none
Workshop registration page	Booked-call offer	Workshop	none
Shared sales script	Booked-call offer	Multi-path	none

The Offers Registry in HQ holds one record per direct offer; acquisition paths are listed inside the record. Roan has exactly two records (the booked-call core offer and the \$27 Blueprint), not three. A new path is born in the Registry first, then the CRM, then the ClickUp dropdown, with the same name in all three.

Other fields: Company/Creator, Campaign/Launch (matches the launch channel name), Workstream, Waiting on (Creator / On-Camera Partner / Vendor / Platform / Internal Dependency), Health (On Track / At Risk / Blocked, on the campaign anchor task and company level only, never per task), Constraint (lab tasks only), On-Camera Partner and Usage rights confirmed (partner content only), and Work Type on every task. Every execution task has exactly one assignee and a due date. The field registry has one owner; nobody else creates fields.

Statuses: local per queue, defined in the dictionary

QUEUE	FLOW
Ongoing and Backlog	Backlog → To Do → In Progress → Waiting → Review → Done
Campaign lists	Backlog → To Do → In Progress → Waiting → Review → Approved → Scheduled → Live → Done
Ads Engine	Angle → Brief → Production → Waiting → Review → Ready → Live → Analyzing → Concluded (verdict Winner / Paused / Fatigued)
Design Studio	New → Triage → Queued → In Progress → Review → Revisions → Approved → Delivered (form entry only; two internal revision rounds plus one creator round)
Partner Content	Requested → Acknowledged → Filming → Submitted → Internal Review → Revision Needed → Approved / Cancelled
Split Test Lab	Hypothesis → Building → Running → Analyzing → Concluded (Result: Won / Lost / Inconclusive / Cancelled; Decision: Rolled Out / Killed / Inconclusive)
HQ Issues & Decisions	Open → Discussing → Decided → Implemented

The WAITING rule. WAITING means work cannot continue until a dependency clears, and the Waiting on field says whose court the ball is in. Waiting on = Creator is what the saved "Waiting on Influencer" view filters on, which is why reporting runs on fields, never on status names. Statuses are operating contracts: every one is defined in the status dictionary with what has to be true to leave it.

Work Type, on every task

Standard Task · Fix · Request · Blocker · Decision · Learning · Iteration · Experiment. This is how the system tells a fix from a decision from an experiment. A Fix goes to its workflow at the right priority, never the lab. A Decision goes to Issues & Decisions with owner, effective date, and what changes. A Learning cannot close without a next action or an explicit "no action required." An Experiment enters the lab only with a complete test card. Never auto-classify from keywords: a Slack [BLOCKER] is a prompt for a human to create the task, never a trigger that creates it.

One master task per unit of work

A launch milestone, an ad, a design request, and an experiment are different units of work. Each gets one master task in its home queue. Related work is connected by dependencies and relationships, never copied. A task lives its whole life in its home list; progress is a status change, never a list move. Templates or it's twice-work: launches, ad briefs, design requests, test cards, meeting agendas are all stamped, never rebuilt.

The launch runbook

A campaign that clears the launch bar in section 04 gets a temporary campaign list created from the Launch Runbook template and a paired launch channel (list `Roan · Webinar · 2026-09`, channel `#launch-roan-webinar-2026-09`); the list is archived after the debrief. Below the bar, the work runs as Ongoing tasks with Campaign/Launch set and a pinned thread in the creator channel. The template anchors on launch day (T-minus tasks land automatically, weekends skipped) and gets built during the pilot from a real campaign. Launch Day and Cart Close are Milestone tasks, so one calendar view filtered to milestones is the master launch calendar across every company.

PHASE	ANCHOR	COVERS	GATE
1 · Lock the offer	T-21 to T-16	Offer, price, stack, deadline mechanics, entry-path plan, kickoff	Offer brief approved
2 · Build assets	T-16 to T-5	Pages, email sequences, ad batch briefed into the Ads Engine, social, partner pack	Every asset passes the checklist

PHASE	ANCHOR	COVERS	GATE
3 · Tech and tracking	T-7 to T-2	Checkout, tags, automations, test purchases	Nothing ships without the test-purchase task closed
4 · Launch week	T-1 to close	Day-of runbook, send checks, stats checkpoints, daily standup	Launch Day and Cart Close milestones
5 · Post-launch	Close +1 to +5	Numbers recap, AAR, observations recorded, template upgraded, list archived	AAR done with owned tasks

The Ariel and Justin ClickUp task breakdowns in the bundle are two worked examples of this runbook: seven epics each, roles not people, every subtask with a definition of done and an L-minus date.

THE DEFINITION OF DONE

A task is not complete because someone worked on it. It is complete only when the stated output is delivered, approved where required, usable by the next owner, and linked to the relevant evidence or final asset. No exceptions by work type.

Testing: attack the constraint

We are always testing, but we never test randomly. Every test comes from the company's biggest current constraint. The sequence: identify the constraint, quantify its impact, form a hypothesis, run the smallest valid test that can produce a decision, measure the one primary metric, decide, apply the learning, choose the next test from the next constraint. If the constraint is a broken checkout or missing tracking, fix it first; do not invent an experiment to satisfy a testing quota.

Know which one you are doing. A Fix corrects something broken. An Iteration improves a known version from prior results (a v02 hook on a winning angle). An Experiment is a controlled comparison under uncertainty. A Learning is a signal that is not yet a test ("Tuesday sends seem to open better"). Only Experiments enter the Split Test Lab, and only with a complete test card: current constraint, baseline, estimated economic impact, hypothesis, the one variable changed, control, challenger, one primary metric, minimum sample or spend or duration, decision rule set before it runs, owner, decision date, next action if won, next action if lost. When several tests qualify, run the one that scores highest on Constraint Impact × Confidence × Ease, each 1 to 5. No scoring system beyond this.

Every active company must have either one active experiment or one documented constraint-removal action. Not several at once; attention splits and attribution muddies.

The Monday and Friday questions

MONDAY MUST ANSWER, PER COMPANY	FRIDAY MUST ANSWER
What is the biggest constraint?	What concluded?
What evidence proves it?	Did the result address the constraint?
What is the baseline metric and the economic impact of removing it?	What changed because of the result?
What test or corrective action attacks it?	Did the constraint improve?
Who owns it, and when do we decide?	What is now the biggest constraint?
What result would change our direction?	What test or action comes next?

Monday's answers are written into the week's agenda task before anyone builds. Friday's answers close it, and the named next constraint becomes Monday's starting point.

Five saved views carry the pilot

VIEW	SHOWS	WHO LIVES IN IT
This Week	Every open task due in the next 7 days, all spaces, grouped by creator	The Monday meeting; you, daily
Overdue	Anything past due, grouped by assignee. Should trend to zero	Monday, 60 seconds
Waiting on Influencer	Waiting on = Creator, sorted by time waiting, across every queue	Pod leads; the nudge ritual
My Tasks	Your tasks by due date. The standup that needs no meeting	Everyone's home screen
Launch Calendar	Every launch day and cart close, all companies, from Milestone tasks	Everyone; pinned

The weekly hygiene audit, 10 to 15 minutes, before Monday planning

- Tasks missing an owner, a due date, or a Work Type
- WAITING tasks missing Waiting on or a follow-up date; stale Waiting on values on tasks no longer waiting
- [REQUEST]s in Slack missing ClickUp links; commitments living in Slack with no task behind them
- [BLOCKER]s that waited past the 60-minute bar
- Decisions missing implementation links; learnings missing next actions; experiments running without a complete test card
- Partner videos missing rights confirmation or a related task
- Tasks nobody has touched in 14 days; channels approaching 90 days of silence; launch channels and campaign lists past their archive date
- Post the counts as one [UPDATE] in #team-ops. These numbers are the Day-30 audit's raw data

Automation: earn it in phases

Phase 1, the first 30 days, is manual: templates, required fields, manual status changes, manual Slack links, manual weekly reports. Phase 2 automates the obvious transitions (reminders, notifications, escalations, form-to-task, partner-upload updates) only after 10 to 20 real examples have run by hand. Phase 3, the reporting layer (Slack summaries, follow-up task creation, CRM integration, dashboards, API scripting), only after the workflow is proven. Automate state changes, routing, reminders, and required fields. Never automate judgment. Automating a bad process just lets you fail faster. This phasing governs ClickUp workflow automation only: the Day-1 sales feed, the design intake form, and every launch-required delivery, payment, tagging, and tracking automation are not deferred by it.

The Roan pilot: minimum build

1. Roan folder: hub doc, Ongoing, Backlog, stamped clean. Active work migrated in; the old mess archived, not reorganized.
2. One real campaign run as a campaign list. When it is done, the cleaned-up list becomes the Launch Runbook template. Reality first, template second.
3. Ads Engine: queue, statuses, ad-brief template, naming convention (`cr0042_priceanchor_hook01_vid_roan_v01`).
4. Design Studio: queue, request form, internal turnaround targets (Urgent 24h, Standard 2 to 3 business days, Build scoped), revision cap.
5. Split Test Lab: board and test card. Empty until the constraint review sends something in.
6. The five saved views, built and pinned.
7. Monday planning and Friday review as recurring agenda tasks with the constraint checklists, walked from the views.
8. Weekly hygiene audit, logged as done or not.
9. Partner Content Queue: the request template, one mobile upload page, one cloud folder, run with one partner. Starts immediately; partner video is a live bottleneck.

Out of scope for the pilot: dashboards, advanced automations, API scripting, influencer guest access in ClickUp, advanced reporting polish, any workflow not required for the active Roan campaign.

Pass criteria, four straight weeks: Monday planning ran from ClickUp views, and Friday's async review used those views with reports in by 3pm CT and the pod lead's decisions recorded the same day; the hygiene audit found fewer than five violations; every design request entered through the form; no private side lists; every experiment decision documented; the current constraint documented every week; every active test traceable to that constraint. The Implementation Guide extends this to the 12-metric Day-30 gate in section 06. Before rolling to Ariel and Justin, add task estimates or another capacity method for design, chosen in the pilot's final week from 30 days of real throughput.

OPEN QUESTIONS THE POD OS NEEDS ANSWERED BEFORE DAY ONE

Q1 Who owns the system (hygiene audit, field registry, template library)? Q2 Which Roan campaign anchors the pilot, and when does the 30-day clock start? Q3 Who is the design lead? Q4 Are copywriters pod-embedded or a shared Copy Desk queue in Production? These sit alongside the D1 to D8 decisions in section 06.

Rollout: the 30-day pilot

Source: Implementation Guide (build) and Rollout Playbook (training). Slack renames go live for all three creators on Day 1 because they are renames of rooms that already exist. The full ClickUp workflow pilots with Roan only. Nothing builds before Day 0 sign-off, and nothing gets redesigned mid-pilot.

Day 0	Adura signs off on the map, the decision flags D1 to D8, owner names, and status defaults.
Day 1	Slack build, half a day: paid plan confirmed, channel creation restricted to admins, renames per the mapping, new channels, descriptions from the template, pins, #announcements set to admin-post-only, sales-feed webhook fired with a test sale, a test refund, and a digest batch.
Day 2	ClickUp build, one day: three spaces, HQ lists, Offers Registry populated (Roan: two records), Roan folder, PRODUCTION queues, fields, statuses, Design Studio form. Migrate Roan's live work into Ongoing and campaign lists. No automations, dashboards, or reporting.
Day 3	Leadership announces and trains: the announcement copy, the five-minute Loom script (word for word), and the acknowledgment checklist are in the Rollout Playbook sections 18 to 20. Before using the announcement and the Loom script, replace their rollout sentences (they describe Roan piloting the communication standard first) with: "The Slack standard applies to everyone now. Roan pilots the full ClickUp workflow for 30 calendar days; Ariel and Justin keep their existing task lists until the rollout gate passes." Every team member reacts ✅ by end of Day 3. Rollout Day 3 is Pilot Day 1. The pilot runs 30 calendar days and must include four complete, documented weekly cycles.
Pilot days 1 to 14	Friendly-redirect era. Answer, then redirect, every time. Hygiene audits on pilot days 7 and 14. Managers enforce per section 07.
Pilot days 15 to 30	Steady state. Audits on pilot days 21 and 28. Wrong-room work messages now get moved, not just answered.
Pilot day 30	Audit against the gate below. Pass: build the Ariel and Justin folders, brief their teams, clone the system. Fail: fix the named friction; recheck a failed point-in-time metric after two weeks, and a failed four-week criterion passes only once four consecutive compliant weeks are documented.

ARIEL, JUSTIN, AND CHRIS JEFFERSON DURING THE ROAN PILOT

Their active work stays in their existing ClickUp lists for the length of the pilot. Pin those list links in the creator channels so every [REQUEST] can carry a link from Day 1. If a list is missing, create a minimal interim list; do not clone the Pod OS structure for them yet. Migrate once, after the gate passes.

Decisions Adura needs to make before Day 1

FLAG	DECISION	WHERE I LANDED
D1	Keep #team-setters, or fold into #team-sales?	Keep it only if setters have a distinct manager, process, or volume today. Otherwise fold and split back out later
D2	Creator access: guest accounts in our workspace, or Slack Connect from theirs?	Either works; pick one model for all three creators. Both need a paid plan. The free tier hides history after 90 days, which an agency cannot live with

FLAG	DECISION	WHERE I LANDED
D3	Sales-feed trigger source per funnel, and who owns the Zap or webhook account	Whop, Stripe, or GHL per offer path, per creator. Thirty minutes of build once named
D4	One owner per standing channel and per active project, by name	Written into channel descriptions before anything renames. Two owners is zero owners
D5	Field and status schema	Two documents carry defaults and they differ: Ads Engine statuses, the Ascension Target examples, where Health lives, and the On-Camera Partner Waiting-on value. Rule: the Implementation Guide's three-field model is the approved reading (Ascension Target is empty for work on the core offer; only the \$27 Blueprint carries one); the Pod OS Blueprint's status dictionary (Part 10) is the proposed status set and supersedes the guide's shorter defaults; Health lives only on the campaign anchor task and the company's Scorecard entry; Waiting on includes On-Camera Partner. Except for these overrides, Blueprint Part 02 governs field values and required and conditional fields, including the Workstream list; HQ and admin tasks require assignee, due date, and Work Type only. Record the approved schema in HQ Issues & Decisions at Day 0, then it is frozen for the pilot
D6	Coverage hours and escalation chain	9:00am to 6:00pm CT, launch owner → growth lead → director. Put names on it
D7	Pilot scope	Slack for everyone on Day 1; ClickUp workflow Roan only for 30 days
D8	Which system is "the CRM" for each creator's business	Confirm before wiring the feed and reports. Do not assume one platform serves all three

The Day-30 gate

METRIC	PASS BAR
Two-minute test, live drill	5 of 5 trials pass, run by someone not on the pilot core
Wrong-room work messages, week 4	3 or fewer, trending down weekly
[REQUEST]s with ClickUp links, sample of 20	100%
Labeled work posts, sample of 20	90% or better
Blocker SLA misses, weeks 3 to 4	0
Commitments living only in Slack	0 found
Archive discipline	Launch channels archived within 7 days of post-mortem; campaign lists archived post-debrief
Constraint identified weekly	4 of 4 weeks documented in HQ Meetings & Agendas
Test card completeness	100% of lab experiments carry a complete card
Concluded experiments produced a decision	100%
Random tests in the lab	0; every experiment traces to a named constraint
Constraint attacked	At least one test or corrective action prioritized against the biggest constraint every week

Rollout requires all twelve metrics above, all seven four-week criteria in section 05, a working capacity method (task estimates or a capacity field) for design and any other constrained team, and a finished pilot campaign: its AAR completed and its cleaned-up list saved as the Launch Runbook template. Record the evidence and the rollout decision in HQ Issues & Decisions. Fail any item and you fix that item, not the design: point-in-time metrics are rechecked after two weeks, four-week criteria need four consecutive compliant weeks. The audit judges friction, never aesthetics.

Leadership's job: make the system stick

This is the section I care most about. In week one, all three team members told me some version of the same thing: we have systems, we just don't work the systems. ClickUp existed. Slack existed. Work still slipped, because ownership and follow-through were inconsistent. A better design does not fix that on its own. Enforcement does.

THE STANDARD

The team works the system every day, and leadership makes sure they do. Not by asking nicely once. By checking daily and weekly, closing the loop on every miss within the day, and praising every correct behavior in public until it is habit. The system should become quieter as accuracy improves. If you still need a daily meeting after 30 days to know what is happening, the system is failing and the fix is enforcement, not another meeting.

The feedback loops

CADENCE	WHO	WHAT	OUTPUT
Daily, 5 minutes	System owner	Scan This Week and Overdue. Any active task not reflecting reality gets a direct message to its owner, that day	Accurate views by end of day. The person, not the team, hears about it
Daily, in-channel	Channel owners, any manager	Redirect every wrong-room message and bounce every unlinked [REQUEST], warmly, within the day. Silence teaches that the old way still works	Redirect counts, tallied for the audit
Weekly, Monday	Everyone in the Game Plan	Every priority leaves with a Who, What, Done, When, and a ClickUp task. Get the verbal commitment in the room: "So you're good to finish this by Thursday?"	Owned commitments, nothing assigned to the room
Weekly, Friday	Each function rep, then the pod lead	End-of-week report or Loom: what shipped and what slipped, with the reason, named by its owner, first and fast, with a fix attached. The pod lead replies with decisions the same day	Closed or rescheduled tasks, a learning filed, decisions in ClickUp
Weekly, 10 minutes	Each manager	Skim your channels for unlabeled work posts, dead threads that ended in commitments, blockers that waited	Counts fed to the hygiene audit
Weekly, 1:1	Manager and report	"What is harder than it should be?" Friction with the system surfaces here first. Fix the friction, hold the standard	Individual development, retention
Monthly	Leadership	Kill any meeting that stopped producing decisions. Review external access, private channel membership, and stale channels	Fewer meetings, cleaner map

Manager enforcement standards

1. **Model it first.** Managers label every work post, seal every decision, and never let their own requests skip ClickUp. The team does what leadership does, not what leadership says.
2. **Redirect every miss in your channels, warmly, within the day.** Weeks 1 and 2: answer, then redirect ("Answered above. For next time this lives in #creator-roan"). Week 3 onward: move it, don't answer in place. The kindness stays; the shortcut stops working.
3. **Bounce unlinked requests with the template, every time, including from other managers.** The work starts when the ClickUp link exists.
4. **Protect -comms discipline absolutely.** Internal content in a -comms channel gets handled the same hour. Never redirect the creator; route it yourself.
5. **Praise publicly in #kudos** when someone routes, labels, or bounces correctly in the first two weeks. Reinforcement beats correction.
6. **Route findings to the individual, never to the team as a new ritual.** The hygiene audit produces direct conversations, not new meetings.

What Adura's part looks like

- Two minutes of public buy-in at the rollout announcement, so the team works the system instead of around it.
- His own requests carry labels and ClickUp links. His own decisions get filed. The team watches the founder more closely than anyone.
- Client communication moves off his phone and into the -comms channels, with an account owner named per creator. Until that happens, every creator relationship depends on Adura's availability.
- Decision rights written down: what the Director decides alone, what needs his yes. The Director 4R draft has the list to start from.

How you know it is working

The redirect count trends down week over week. Nobody asks "wait, what did we decide?" because a search for [DECISION] answers it. The hygiene audit finds fewer than five violations. Monday runs from the views instead of from memory. The calendar gets quieter, not busier. If any of those reverse, the answer is a direct conversation with a person, that day.

The team

From hour-long calls in week one: goals first, then how each person likes to be managed, then the gaps they see. Common threads across all three: nobody was clear on who owns what, tasks were assigned to the room, the numbers weren't visible enough to know what to optimize, and meetings were too many and too long. Weekly 1:1s with each of them were being set up when I left; make them standing in your first week.

Ahmad

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WHAT DRIVES HIM	Enjoys the work and loves the numbers; playing with the numbers is the part he likes.
MEETINGS	Not every day. A weekly "what worked last week, what's the plan for next week, do you need any support," an end-of-week "did we get it done," and a strategy call monthly or biweekly. Says the old meetings were fluff with no structure.
METRICS HE ASKED FOR	Red-light / green-light rules he can act on. KPIs at day 0, 7, 14, 30: CPA, CPC, CPS. Break-even ROAS and a 3x ROAS target including back-end, with a rule attached: if we are at X, we do another; if not, no. Prefers daily stats in their own channel.
GAPS HE NAMED	Lack of clarity around roles ("check X, maybe it's not for me"). Wants clear responsibilities and better task management: work the system.
OPEN WITH ME	Retargeting structure (best-buyer vs behavior-trigger custom audiences) and whether buyer data flows back to Facebook. I never closed these. Ask him in your first 1:1.

Hamza

Creative strategy and ads copy · Pakistan · marketing since 2022

WHAT DRIVES HIM	Wants to be a respectable marketer. Wants the creative strategist lane and to focus on writing ads.
HOW TO GET HIS BEST WORK	By his own account he does his best work with high stakes and tight constraints. So: tight constraints, smaller chunks, fast feedback. Not "get the full sequence done this week" but "here is the full week, first three buttoned up by tomorrow for feedback." He values per-piece feedback; I was reviewing every email with him. A copywriter should absorb that.
MEETINGS	Stats before the meeting, so the meeting is about what the stats mean and what we do about them. If he can't join a call, he sends a Loom and updates before or after his shift.
TOP THREE TO SOLVE	Data: we need the dashboard. Creative briefs and the creative process. What we do with an offer when it comes to an end. Wants the TRUE CAC reverse-engineered.
HIRING	Agrees the next hire is a copywriter. Flagged capacity as the reason not to send daily emails; my position was a minimum of three value emails a week between promos. Confirm who owns that minimum and the workload behind it.
CAPACITY	He was onboarding Chris Jefferson (CRO real estate offer) when I left.

Marenti

Project manager and data owner · started in banking, then BPO analyst work

WHAT DRIVES HIM	Craves feedback: direct feedback, his ideas taken seriously, and clear ownership. Wants to become a COO. Ideas being valued matters to him. Hates negative energy.
WHAT HE OWNS IN PRACTICE	Project management, and the data. He has the dashboard (v2 was planned) and he was my partner on the ClickUp rework. As the project manager he is the natural system owner (section 05, Q1); confirm it with him rather than assume it.
MEETINGS	Rated ours 4 out of 10: not speaking to what's important, repetitive, unstructured, longer and more frequent than they should be. Wants one weekly meeting, short, precise, on point. Flexible on Monday, Wednesday, or Friday.
WHAT HE WANTS FROM THE SYSTEM	Long-term tracking of the tests we ran and what worked, so decisions made on calls don't fall off. Visibility over time. Buy-in: "for the process to make sense, people need to want to do it." That is the Learnings Library and the Split Test Lab, exactly.

Hiring pipeline, as of Aug 20

- **Copywriter, hire #1.** Brief out to a part-time copywriter I've worked with and trust (named in the week-one report). Status after Aug 21 unknown to me.
- **Video editor and designer** on trial tasks. Keep / pass reads were due the following week.
- **Funnel builder.** Intro call set up by Adura.
- Confirm where each of these landed before you open any new search. Hiring triggers are in the pod structure doc: contractors first, convert anyone sustaining 25 to 30+ hours a week for a month.

Work in flight

Everything here is as of September 1. Dates may have moved. The first thing to do with each item is confirm where it actually stands today.

FIRST MOVE

You are accountable for launch coordination until Adura names another owner. Both launch briefs assign roles, not people. With Hamza and Marenti, map every RACI role to a name, and record for each launch the current task list, asset folder, staging or live page, and QA evidence links before you assign any further work. During the Roan pilot their work stays in their existing lists (section 06).

Ariel: Personal Brand Playbook • launch Sep 7

- \$27 six-module video workshop plus the Face Card Agent. Three order bumps (\$17 / \$17 / \$9), a \$67 to \$97 Toolkit one-click upgrade. All content client-supplied and final.
- Scope: sales page, checkout with bumps, OTO, thank-you; member portal gated per SKU; instant zero-touch provisioning; refund → revoke; access email, 5 to 7 onboarding emails, 2 to 3 cart recovery, 2 to 3 Toolkit follow-up; pixel, GA4, UTM kit, KPI dashboard with day 0/7/14/30 cohorts.
- Targets to confirm: sales page CVR 5%+, bump attach 25%+, OTO take 10%+, AOV \$40+, purchase-to-access under 2 minutes, refunds under 5%, 100% attributed.
- Plan: Plan Aug 21 to 26, Build Aug 26 to Sep 2, Wire Sep 2 to 4, freeze Sep 5, live Sep 7, 48-hour monitoring, day-3 KPI readout Sep 9. Seven epics with every subtask's definition of done are in the ClickUp task breakdown.
- Open at kickoff: platform stack (cart, portal, email) and the Toolkit price. Biggest risks: a stack decision dragging, agent-setup friction turning into refunds, entitlement mapping across 16 purchase paths.
- Traffic is Ariel's organic audience. Paid media and ad creative are a separate decision after the readout; do not activate the runbook's ad-batch tasks for this launch.
- **Do now:** confirm whether the launch went live on Sep 7 and whether an AAR happened. This is an evergreen offer with no cart close, so the launch window ends at the day-3 readout (Sep 9 in the brief) and the AAR is due within five days of it; schedule it if it has not happened. Get the day-3 numbers against the targets above. If the launch slipped, find where the build stalled and put an owner on it.

Justin: 10M Shares Playbook • kickoff Sep 3, launch Sep 24

- \$27 pure-information front end (9 myths, 7 Share Triggers, The Cook Up, "What 9.9M shares bought"). Bumps \$17 / \$27 / \$34 (50 Openers, Cook Up Tapes, Bundle). \$197 First Month Written Pack upgrade, \$97 downsell. Information at \$27, implementation at \$197.
- Plan: Plan Sep 3 to 9 (PM-led while the build team clears Ariel), Build Sep 9 to 17, Wire Sep 17 to 21, freeze Sep 22, live Thu Sep 24, readout Mon Sep 28. Same seven-epic structure.
- Open at kickoff: platform stack, downsell structure (\$97 two-pay vs Month Prompt alone), whether the Bundle replaces or stacks with single bumps at checkout.
- Traffic is Justin's organic audience. Paid media is a separate decision after the readout; do not activate the runbook's ad-batch tasks for this launch.
- The initial launch window ends at the Sep 28 readout if the dates hold. End the daily standups there and hold the AAR within five days of it. If the launch moves, the launch owner records the revised window end.
- **Copy state:** two copywriter drafts (v1, v2) got copy-chief feedback on Aug 31; the approved direction is the rewrite plan; sales page v3 was written from it (angle: heresy plus receipts, working headline C1). A voice spec built from Justin's own transcripts is in the folder. Read it before anyone writes a line for him.

- **Open items you inherit from me:** the headline choice (v3 lists three finalists, one of them gated on a screenshot), the screenshot inventory for every celebrity repost named on the page, and confirmation of the current approved copy with Hamza. V3 stays a draft until those approvals are recorded.

CLAIMS RULES FOR JUSTIN'S PAGE. THESE ARE RULES, NOT NOTES

No celebrity name on the page until we hold that name's screenshot. The verb is shared or reposted, never anything that smells like endorsement. No income promises and no follower promises to the buyer; Justin's numbers are his story only. Zero student results exist, so none get invented and none get implied. Justin is the proof, and the page owns that. Zero em dashes anywhere.

Chris Jefferson • CRO real estate offer

Hamza was onboarding him when I left, scoped at one to two weeks. I built nothing for this and have no brief. Before it goes further, it needs the same shape as the other two: a project brief, a minimal interim ClickUp task list during the pilot (the runbook template does not exist until the Roan pilot campaign finishes), migrated after the gate passes, and a decision on whether it clears the launch bar. See section 11 on whether it should be running at all right now.

Roan: Performance Tracker • live Google Sheet

- Nine tabs: Dashboard, Daily, Rep Daily, Deals, Weekly Summary, Cohorts, Monthly Summary, Rep Report, Lists. Two revenue streams tracked separately: front-end (self-serve: tickets, bumps, upsells) and high-ticket (rep-closed). Headline KPI of the split is Front-End Spend Coverage: front-end cash divided by ad spend; over 100% means front-end cash covered the ad spend; other costs still apply.
- The Dashboard auto-diagnoses the biggest constraint per funnel (opt-in, show, schedule, call show, close rate vs editable targets) with a dollar-impact estimate. That output should feed the Monday constraint review directly.
- It is seeded with sample data. Marenti coordinates the cutover to real numbers: clear the synthetic inputs (yellow cells only, never formula cells), assign one owner each for Daily entry, Rep Daily entry (calls only), and Deals entry, and reconcile the first real reporting period against the payment platform. High-ticket deals are entered only on Deals, one row per closed deal, with a date typed in the installment Paid column when money lands (that drives the overdue chase list and the receivables forecast); Daily high-ticket totals and Rep Daily deal totals derive from it.
- After about a month of real data, recalibrate the CONFIG targets on the Lists tab. Never rerun the build script; it wipes all tabs.

Marketing Command Calendar

A static planning prototype: a one-page view of launches, live moments, sequences, gates, tests, and AARs across creators. Ariel and Justin milestone dates come from the briefs; owners, Health, readiness gates, and Roan's dates are illustrative. The ClickUp and Slack buttons are not connected. Use verified launch records for operating decisions until the sync is built, and do not build the sync until the manual pilot proves the process.

The week-one build list: what got built

#	BUILD (FROM THE AUG 20 PLAN)	STATUS AT SEP 1	
1	Roles and responsibilities doc per person	not written	The gap all three named. Do this in week one
2	Meeting operating system	designed	Operating Rhythm v1.3; not yet running
3	ClickUp rebuild plus Slack structure	designed	Pod OS plus Slack Blueprint; build not started
4	Weekly scorecard plus management call	designed	HQ Scorecards plus Friday Ship and Learn

#	BUILD (FROM THE AUG 20 PLAN)	STATUS AT SEP 1
5	Cohort tracking, day 0 / 7 / 14 / 30 / 60+	partial Roan: close-week cohorts with payback at close / 30 / 60 / 90 days (tracker). Ariel: day 0 / 7 / 14 / 30 specified in the brief. Justin: day 0 / 7 / 30 specified. The common acquisition-cohort view is not yet implemented
6	KPI benchmarks per offer, paired with the per-offer calculator	built calculator not in this bundle; benchmarks not published; tracker targets are defaults
7	Fully-loaded CAC model	blocked needs payroll and overhead numbers from Adura
8	Dashboard v2 across departments	Marenti's confirm status with him
9	Email engine: tracking, tagging, segments, auto-tagging, custom audience sync, deliverability audit, 3x/week cadence	not started beyond the deliverability passes specced in the launch briefs
10	Weekly ad research report, automated	started process mapped, not shipping weekly
11	Always-on split testing	designed Split Test Lab plus test card; empty until the pilot
12	Creative conveyor belt for partners	designed Partner Content Pipeline in the Pod OS; not built
13	Retargeting rebuild plus buyer data back to Facebook	open questions never closed with Ahmad
14	Instagram ManyChat flows	not started assets exist, content strategy does not
15	Client onboarding imprint (voice doc, do's and don'ts, avatar)	one instance Justin's voice spec is the model; not templated
16	30-day launch system with ClickUp templates	two worked examples Ariel and Justin task breakdowns; the runbook template gets built from the Roan pilot campaign
17	Account manager structure	not proposed client comms still ran through Adura's phone at my exit

10

The numbers the team asked for

In week one we were flying blind: no cohort view, no benchmarks, no fully-loaded cost per customer, and no clarity on what each person should be optimizing for. Ahmad and Hamza both asked for the same fix. Here is the framework; most of the plumbing is specced in the launch briefs and built in the Roan tracker.

NUMBER	DEFINITION	WHY IT MATTERS	WHERE IT LIVES
Cohort revenue, day 0 / 7 / 14 / 30 (60+ for cross-sell)	Revenue per acquisition cohort as it matures	We might be break-even on day 5 and at 3 to 4x by day 14. Right now that is a guess	Not yet as one view. Roan tracker: close-week cohorts, payback at close / 30 / 60 / 90 days. Ariel and Justin: specified in their launch KPI dashboards (day 0 / 7 / 14 / 30 and day 0 / 7 / 30)
CPA, CPC, CPS by day 0 / 7 / 14 / 30	Cost per acquisition, click, sale at each horizon	Ahmad's red-light / green-light	Ad platform plus the dashboards above
Break-even ROAS and target ROAS	The ROAS at which a cohort pays back, and the bar for scaling. Ahmad's proposed target: 3x including back-end	The rule he asked for: at or above target, run another; below, no. Before it becomes a scale rule, you and Adura approve per offer the revenue basis (cash vs booked), the cohort horizon, the break-even threshold, and the action	Per-offer calculator (not in this bundle); the approved basis, horizon, threshold, and rule recorded with the offer in the HQ Offers Registry

NUMBER	DEFINITION	WHY IT MATTERS	WHERE IT LIVES
Fully-loaded CAC	Ad spend plus payroll plus overhead, averaged per customer	Hamza's "true CAC." Blocked on payroll and overhead inputs from Adura	Not built
Front-End Spend Coverage	Front-end cash divided by ad spend	Over 100% means front-end cash covered ad spend; other costs still apply	Roan tracker Dashboard
Funnel stage rates vs target	Opt-in, show, schedule, call show, close	The biggest constraint is the stage furthest below target, with its dollar impact	Roan tracker, auto-diagnosed per funnel
Launch KPIs	CVR, bump attach, OTO take, AOV, refunds, purchase-to-access time	The targets in each launch brief	Launch KPI dashboards

Publish the benchmarks. Once the first real month of data is in, put a target next to every number above, per offer, and pin it where the team sees it. Ahmad asked for exactly this and he is right. Numbers get read before the meeting; the meeting is about what they mean.

Email cadence. The play I run elsewhere: four sends a day, each to a tight engagement segment (active, less active, opened in 30 days, clicked in 30 days, visited in 30 days), with auto-tagging so it runs itself and the same segments uploaded as custom audiences. The minimum here is three value emails a week between promos, built around the lead magnets. That protects deliverability and keeps us top of mind between launches.

My read: where I'd focus

This section is opinion. It is what I would do in your seat; take what is useful and leave the rest.

One creator, one offer, one funnel, until the checklist is proven

When I left there were three launches in motion (Ariel Sep 7, Justin Sep 24, Chris Jefferson onboarding), new offers being discussed, and a Roan pilot that had not started. Every one of those was a good idea on its own. My concern is that concurrent launches plus the pilot exceed the team's current capacity, and that every new client inherits a process that has not been proven yet. I would agree a priority order with Adura before adding work.

The business sells trust. A creator hands us an audience they spent years earning. If the delivery leaks (slow access, a refund that doesn't revoke, an email that lands in spam, a number nobody can find), the creator notices before we do, and reputation is the one asset that does not come back on the next launch. Onboarding more clients onto a leaky process does not scale the business; it scales the leak.

So: pick one creator and go all in. Solidify one offer and one funnel end to end. Get the checklist to the point where the team can execute it fast and at a high level without you in every thread. Then, and only then, expand. Use the result as the proof that wins the next creator. Prove, document, duplicate.

If it were completely up to me: Roan is the established business, so keep running it and maintain what already works there. It stays the process pilot for the ClickUp workflow because it is the most mature. Justin has the highest potential of the three, so nearly all of the growth effort would go to Justin, with Roan maintained rather than expanded. The team's creative and media firepower should sit behind one creator at a time. Choose, commit, and say it out loud so the team stops splitting itself.

Fix the leaky bucket before adding water

Concretely, before any new offer or new client: cohort revenue visible at day 0, 7, 14, 30 for the offers already live; instant delivery proven with a test-purchase matrix; refund and failed-payment handling proven; email segmented with a value cadence running; and one named constraint per company being attacked every week. The Pod OS gives you the rule: every active company has exactly one constraint being attacked. If you cannot name Roan's constraint and its number, you are not ready to add Ariel's, let alone a fourth.

Decision rights, and pushing decisions down

The team's loudest request was clarity: who owns what, and the freedom to own it. Adura has a very clear picture of how he wants things done. That is an asset when it is written down as a standard and a bottleneck when it lives as approvals routed through him. Your job is to turn approval-dependent work into documented standards the team can execute: get his standards into checklists and SOPs, then hold the team to the checklist instead of routing the work through him. Agree in week one what you decide alone and what needs his yes, and write it down. The Director 4R draft has a decision-rights section to start from. Leadership's role is to set the standard and enforce the system, not to be the only person who can approve a task.

What this looks like at 90 days

The Roan pilot has passed the gate. The launch runbook exists as a template because it was built from a real campaign. Ariel and Justin are stamped from it, both with a constraint named every Monday. The team reads its numbers before meetings and argues about what they mean instead of what they are. Then a new client signs, and the offer is live in 30 days because the machine has done it before.

Where everything lives

Everything this document depends on is linked below, or download all of it at once: Pod-Handoff-Bundle.zip (includes this document as a PDF: Pod-Handoff.pdf). One exception: the per-offer economics calculator from week one is not included.

FILE	WHAT IT IS	READ IT WHEN
Pod-Rollout-Playbook.pdf	Leadership and team training: decision tree, 35 routed examples, contrasts, launch-week protocol, enforcement, redirects, FAQ, announcement copy, Loom script, acknowledgment checklist	Second, after this document. It is what you train the team with
Pod-Implementation-Guide.pdf	The build manual: exact Slack and ClickUp checklists, rename map, fields, statuses, forms, feed spec, access, hygiene audit, timeline, gate, templates	When the system owner builds, Day 1 and Day 2
Pod-OS-ClickUp-Blueprint.pdf	The operating standard behind ClickUp: spaces, field model, master task rule, launch runbook, Ads Engine, Design Studio, Partner Content Pipeline, testing philosophy, status dictionary, views, weekly rhythm, working rules, automation phasing, the Roan pilot	Before Day 0 sign-off, and whenever a status or field question comes up
Pod-Slack-Blueprint.pdf	The Slack standard in full, with the reasoning behind each channel	Before Day 0; pin the routing rule from it
Pod-Operating-Rhythm.pdf	The meeting cadence in full, plus the reference reading behind it (appendix, not policy)	Before your first Monday
Pod-Structure-Creator-Monetization.pdf	Phases, capacity caps, hiring triggers, shared vs embedded teams	Before any hire or any new creator
Week-1-Audit-Build-Plan.pdf	What I found in week one and what I planned to build	For context on the 17-item list in section 09
ariel-pbp-launch-brief.pdf · ariel-pbp-clickup-tasks.md	Launch brief v1.2 and the ClickUp task breakdown	Immediately, to confirm launch status
launch brief · ClickUp tasks · copywriter brief · voice spec · sales page v3 · copy-chief feedback · rewrite plan · Aug 31 note	Launch brief, ClickUp tasks, copywriter brief, voice spec, sales page v3, copy-chief feedback, rewrite plan, the Aug 31 note to the copywriter	Before the Sep 24 launch; the claims rules are non-negotiable
marketing-vision-core-values.md	Purpose, BHAG, the five values (Hold The Standard, Figure It Out, Own The Outcome, Iron Sharpens Iron, Speed Wins), how we win	When you write the roles docs and when you hire
director-of-marketing-4r.md	The seat: role, responsibilities, results, requirements, decision rights, the 30-day offer factory skeleton	Week one, with Adura
drive/Drive-Standard.md · Drive-Cleanup-Prompt.md · create-folders.gs	The Google Drive standard, the paste-ready cleanup prompt, and the folder-stamping script (My Drive)	Section 14, when Marenti starts the Drive cleanup
Roan Performance Tracker	Live Google Sheet	Open the Roan Performance Tracker
Marketing Command Calendar	Shareable page, read-only	Open the Marketing Command Calendar

Shareable web copies of the four operating documents also exist (Slack Blueprint, Implementation Guide, Rollout Playbook, Operating Rhythm); the PDFs in the bundle are the same content and travel better.

Your first 30 days

A suggested order. It follows the pilot timeline in section 06, with the people and in-flight work folded in. Rollout Day 3 is Pilot Day 1 and the pilot runs 30 calendar days, so the gate lands around week six in your seat, not on your 30th day.

Week 1: read, meet, decide

- ☐ Read this document, then the Rollout Playbook, then the Implementation Guide, then the Pod OS. Two hours total.
- ☐ Confirm the status of Ariel's launch, Justin's build, and Chris Jefferson. Name who owns each launch (section 09, first move). Schedule Ariel's AAR if it has not happened.
- ☐ Hour with each of Ahmad, Hamza, and Marenti, using section 08. Set standing weekly 1:1s.
- ☐ Sit with Adura: decisions D1 to D8 and Q1 to Q4, decision rights in writing, payroll and overhead numbers for the CAC model, and his two minutes of public buy-in at the announcement.
- ☐ Name the system owner (Marenti, as project manager, is the natural fit) and the Roan campaign that anchors the pilot.
- ☐ Write the three roles-and-responsibilities docs. It is the gap the whole team named first.
- ☐ Decide, and say out loud, which creator gets the team's focus (section 11).

Week 2: build and announce

- ☐ Day 0 sign-off. Day 1 Slack build. Day 2 ClickUp build. Day 3 announcement, Loom, acknowledgment checklist. The pilot clock starts on Day 3.
- ☐ First Monday Game Plan run from the This Week view, with one constraint named per company. First Friday reports or Looms in by 3pm CT, decisions posted the same day.
- ☐ Start the Partner Content Queue with one partner. Document every question they ask; each one is a defect in the brief.
- ☐ Kick off the Drive cleanup with Marenti (section 14): step 0 answers recorded, inventory started. Live campaigns stay untouched until their AAR.
- ☐ Redirect every wrong-room message, bounce every unlinked request, praise every correct one in #kudos.

Weeks 3 to 6: operate and hold

- ☐ Hygiene audits on pilot days 7, 14, 21, and 28, counts posted in #team-ops.
- ☐ Justin launch week if the date held: daily 10-minute standup, one [UPDATE] a day, standups end at the Sep 28 readout, AAR within 5 days of it with owned tasks.
- ☐ Real data into the Roan tracker; first Monday where the constraint comes from the sheet, not from memory.
- ☐ Pilot day 30: run the gate, which also requires the pilot campaign's AAR done and its list saved as the Launch Runbook template. Pass, then stamp Ariel and Justin. Fail: recheck a failed point-in-time metric after two weeks; a failed four-week criterion needs four consecutive compliant weeks.

Do not

- Do not redesign the system mid-pilot. Change it only at an audit, from evidence of friction.
- Do not add ClickUp workflow automations, ClickUp dashboards, or the calendar sync until the pilot has run 10 to 20 real examples by hand. The design intake form, the sales feed, and every launch-required delivery, payment, tagging, and tracking build stay in scope.
- Do not add a standing daily meeting. If you feel you need one, fix ClickUp accuracy.
- Do not rerun the Roan tracker build script. It wipes the sheet.

- Do not take on a new client until the Day-30 gate passes. That last one is my opinion; the rest are the standard.

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Google Drive: the standard and the cleanup

The Drive is the one part of the system that was never designed; it grew. Files are everywhere, versions are unclear, and raw, edited, and final video sit in the same folders. This section gives the Drive the same shape as ClickUp and Slack, and a prompt Marenti can paste into Claude or ChatGPT to run the cleanup safely. The full standard, the prompt, and a folder-stamping script are in the bundle under `drive/`.

The shape: four Shared Drives

DRIVE	HOLDS	MEMBERS
HQ	SOPs, runbook and SOP templates, company brand masters, blank hiring templates, meeting agendas, the Archive Index	Everyone internal
HQ Restricted	Signed contracts, deal terms, signed releases, unredacted receipts, personnel records, compensation, finance, the cleanup inventories and logs	Leadership and named custodians
Creators	One folder per creator, stamped from one template	Drive-wide only for roles that serve every creator; everyone else gets named folders
Production	Reusable craft libraries (licensed stock, music, fonts, edit and design templates, the ad reference library) plus shortcuts to creator work. Creator originals never live here	Internal team

Closure is a record, not a move across drives: ClickUp records it and the Archive Index in HQ points at closed records, which stay inside their access boundary. No Workspace? The same four as top-level folders in a company-controlled account, as a temporary arrangement, never a person's Gmail.

The creator folder template

```
<Creator>/
00 Hub/          brand kit, voice spec, avatar and research, contacts, links to ClickUp, CRM, tracke
05 Intake/        the single upload destination, one folder per request or batch; editing closes on :
10 Assets/        Video, Audio, Photos, Design, each with Raw / Working / Final
20 Copy/<offer>/<campaign or evergreen>/  owns all copy; other folders hold shortcuts
30 Offers/<offer>/  00 Brief and Map, 10 Source, 20 Working, 30 Delivery/<release> with a manifest
40 Campaigns/<ClickUp campaign name>/    00 Brief, 10 Copy, 20 Creative, 30 Tech and Tracking, 40 No
50 Reports/        weekly creator reports, monthly reviews, exports (dated)
60 Meetings/       recordings, notes, needs-from-you lists (dated)
70 Proof/          Proof Register sheet, testimonials, screenshots, results; signed releases stay in t
```

Raw, Working, and Final are storage stages, not statuses. A file enters Final when its ClickUp task reaches the approved state for its queue (Ads Engine Ready; Design Studio Approved, then Delivered; Partner Content Approved with the handoff fields complete), and the move is made by a named custodian (a Content manager or Manager) after the asset owner verifies it. A file enters an offer's Delivery folder only after the approver confirms the package is usable, rights cover customer distribution, and the owning task is linked, with the evidence in the manifest. Drive folder names match ClickUp names: the campaign-list display name (Roan · Webinar · 2026-09), the full versioned creative key (cr0042_priceanchor_hook01_vid_roan_v01), the partner batch ID (ROAN-PVR-B03).

Eight rules, pinned in every creator's Hub doc

- 1. **Raw is untouchable.** Never edited in place, renamed, or deleted. Original filenames stay so edit projects can relink.
- 2. **Final means four things at once:** usable to spec, approved in its queue, rights confirmed for the intended use, linked from the owning ClickUp task and any separate requesting task that exists. Missing one, it stays put and the task says why.
- 3. **Working holds drafts and production files.** Thirty days after the owning task closes, or after the campaign AAR, the owner reviews it for archive. Archived means moved to an archive folder, never deleted.
- 4. **Company-controlled Drive is authoritative.** Local working files get uploaded or synced before any handoff.
- 5. **Creators and their teams get their specific batch Intake folders, Reports, and requested Final folders; filming partners get only their batch's Intake folder; neither gets drive membership.** Same principle as the -comms channels.
- 6. **Restricted originals stay in HQ Restricted.** A shortcut goes elsewhere only if its title is safe to disclose, and a shortcut grants no access.
- 7. **Drive names match ClickUp names.** Drive holds the files; ClickUp holds the status.
- 8. **Nothing is deleted during the cleanup.** After it, archive rather than delete unless leadership writes a retention rule.

Access, in one table

WHO	ROLE
Leadership and named custodians	Manager on the drives they administer; members of HQ Restricted
Staff who serve every creator (system owner, media buying, design lead)	Content manager on Creators and Production; Contributor on HQ. The custodian who moves files into Final is one of them
Creator-scoped contractors	Not members. Editor on that creator's named Working and Copy folders, plus Viewer on the specific Raw batches and source folders their tasks require, all granted at folder level
A creator and their team	Not members. Editor on their specific Intake batch folder (never its parent) until receipt; Viewer on Reports; Viewer on specific Final folders on request
A partner filming for a creator	Editor on one Intake batch folder, for that batch only

Link sharing is never used on HQ Restricted, Proof, Raw, or Intake. Offboarding is same-day and covers membership, direct shares, and inherited routes. Weekly hygiene adds five checks to the existing audit: loose files within cleaned scope, Final folders without a ClickUp key, Working items awaiting archive review, Intake folders still open, new link-sharing on sensitive folders, and the Unsorted count trending to zero.

The cleanup prompt

Paste the text below into Claude or ChatGPT, attach `drive/Drive-Standard.md` and `drive/create-folders.gs` to the same message, and work through it with the system owner. It runs with or without a Drive connector: without one, it produces numbered manual actions and tracks human-confirmed results. It never deletes anything.

You are reorganizing the Google Drive of a creator-publishing company into the attached Drive Standard.

BEFORE ANYTHING ELSE

List the capabilities you actually have in this session (read Drive, write Drive, create Sheets, none).

CONTEXT

- The company builds and runs offers for creators (Roan, Ariel, Justin, more coming). Each creator is
- The Drive today is chaotic: per-creator folders with functional subfolders, files everywhere, versio
- Nothing is deleted, trashed, overwritten, or stripped of revisions during this cleanup. Anything you

RULES YOU NEVER BREAK

1. Inventory before you move anything. Permissions and the skeleton are settled before the first move
2. Never delete, trash, overwrite, or remove revisions. Never rename raw footage.
3. Move in small batches, highest-value assets first, and reconcile every batch before the next.
4. Log every action in a Google Sheet, 'Drive Cleanup Log <date>', stored in 'HQ Restricted/Drive Clea
5. Legal, finance, contracts, compensation, personnel, and rights documents move only with the system
6. Sensitive or unidentified items never go to Unsorted. They stay in place, flagged, until classified
7. Anything live is off limits: live campaigns' working files, published customer downloads, evergreen
8. Halt the batch and report if you see an unexpected access change, a missing item, a log failure, or

STEP 0. Confirm before starting. Get written answers from the system owner and record them at the top

- Google Workspace with Shared Drives, or a single Google account? For Shared Drives, files belong to
- Who is the single owner of this cleanup, and who approves legal and rights questions?
- The current creator registry (active creators) and campaign registry (live campaigns, their ClickUp
- The exact source roots to scan (folder or drive URLs) and the destination drives or folders.
- Existing ClickUp hub docs and template links, so wiring in step 5 updates real records rather than :

As soon as the custodian and the authorized recipients are confirmed, create or verify the logging des

STEP 1. Inventory. Enumerate recursively every accessible file, folder, and shortcut under the listed

STEP 2. Exception review, then the permissioned skeleton. Walk every flagged and low-confidence row w

STEP 3. Approved batch plan, then move. Pilot on 20 low-risk files from one creator. After the pilot :

- a. Approved creative deliverables to '<Creator>/10 Assets/<type>/Final/<deliverable key>/', where typ
- b. Raw footage to '<Creator>/10 Assets/Video/Raw/<batch>/' (Audio and Photos likewise). Keep original
- c. Closed campaigns (AAR done; record the AAR date) to '<Creator>/40 Campaigns/_closed/<AAR year>/<C
- d. Offer content to '<Creator>/30 Offers/<offer>': client-supplied material to Source, build files t
- e. Legal, contracts, deal terms, compensation, personnel, finance, and signed releases to 'HQ Restrict
- f. Only inventoried, approved, nonsensitive items you still cannot place go to 'Unsorted/', one subfo

Log before each mutation (status Planned), read back afterward (Verified or Failed), and persist the :

STEP 4. Ownership and sharing, verified per item. For Shared Drives: confirm organizational ownership

STEP 5. Wire it to the system. Put each creator folder link in that creator's ClickUp hub doc. Put the

STEP 6. Verify and report. Reconcile every inventoried item to exactly one state: moved and verified,

WEEKLY AFTER THAT (10 minutes, part of the existing hygiene audit): loose files within cleaned scope;

Work the system. Hold the standard. Prove it on one before you clone it.

Brycen Coffman · September 2026 · Publishing Pod Handoff · Companion to the Pod Slack Blueprint v3, Pod Operating Rhythm v1.3, Pod OS ClickUp Blueprint, Pod Implementation Guide, and Pod Rollout Playbook.