

Pod Implementation Guide

The build manual for the system owner. Everything needed to stand up the Slack, ClickUp, and feed architecture exactly as approved, run the Roan pilot, and pass the 30-day gate.

Aug 30, 2026 Audience: system owner / ops lead Standard: final, do not redesign

01 • PURPOSE

Purpose and success criteria

We launch and grow influencer-led businesses. Each creator (Roan, Ariel, Justin) is an operating business unit with its own offers and acquisition paths. This guide implements the approved communication and work-management standard across Slack, ClickUp, and the CRM.

The one test everything must pass: can a new hire find the right conversation, its owner, the relevant decision, and the next action in under two minutes?

Success criteria for the implementation itself:

- Every channel in section 02 exists, named exactly as written, with a template-compliant description, pinned norms, and one named owner.
- Every ClickUp space, folder, list, and field in section 06 exists as written. No extras.
- The sales feed posts automatically per section 10, with refunds and cancellations included.
- The Roan pilot runs 30 days and passes the criteria in section 15 before anything rolls to Ariel and Justin.
- Zero history lost: existing channels are renamed, never deleted and recreated.

Offers and acquisition paths (for Roan: Webinar → Book a Call, Workshop → Book a Call, \$27 Blueprint → Core Booked-Call Offer) are tracked in the CRM and in ClickUp fields. They never automatically receive permanent Slack channels.

02 • SLACK

Final Slack architecture

Slack is organized by **company, function, and temporary initiative**. 19 standing channels (18 if setters fold into

sales) plus temporary launch channels.

GROUP	CHANNELS	MEMBERSHIP
Company-wide	#announcements #kudos #sales-feed #lounge	Everyone
Creator / business	#creator-roan #roan-comms #creator-ariel #ariel-comms #creator-justin #justin-comms	Team assigned to that creator; the creator and their team are in-comms only
Shared teams	#team-marketing #team-design #team-sales #team-setters #team-ops	Function members + people who act with them
Private	#private-leadership #private-people #private-finance #private-legal	Need-to-know only
Temporary	#launch-[creator]-[initiative]-[YYYY-MM]	Everyone working that launch; internal only

Channel definitions that must survive into every description:

- #creator-[name] is the internal operating channel for that creator's business: strategy, numbers, funnel decisions, internal debate, day-to-day execution, cross-funnel decisions. External stakeholders are never included.
- #[name]-comms is the external-facing channel for that creator and their team: updates, approvals, requests, timelines, finalized decisions, next steps. Write as if the creator is reading it, because they are. Never internal debate, unresolved disagreements, performance issues, compensation, sensitive strategy, or blame. Internal disagreement resolves in #creator-[name] first.
- #launch-... holds internal launch coordination. External communication during a launch still belongs in #[name]-comms. Never add external stakeholders to internal launch channels by default.

DECISION REQUIRED • D1

Keep #team-setters only if setters have a distinct manager, process, or volume today. If not, fold into #team-sales at build time and split back out when the condition is met. Confirm before Day 1.

The routing rule (pin everywhere): send every message to the smallest room containing everyone required to act.

CONTENT	DESTINATION
Company strategy, numbers, cross-funnel decisions	#creator-[name]
External stakeholder communication	#[name]-comms
Internal live campaign coordination	#launch-[name]
Shared craft or reusable learning	#team-[function]
Company-wide information	#announcements
Recognition	#kudos
Automated sales	#sales-feed
Sensitive information	#private-[area]
Anything with an owner and deadline	ClickUp

House rules to pin: threads required for follow-up · DMs for logistics and private matters only · Slack surfaces work, ClickUp owns commitments · CRM owns attribution, conversion, and revenue reporting · one owner per channel and project · rename rather than recreate where possible · launch channels archive after the postmortem · channels silent 90 days get reviewed for archival · only operations and leadership create channels · propose new channels in #team-ops.

Labels for top-level work messages: [DECISION] [REQUEST] [BLOCKER] [UPDATE] [LEARNING].
A [REQUEST] must include what, owner, deadline, definition of done, and a ClickUp link.

Coverage hours: 9:00am–6:00pm CT, Monday–Friday. Same-business-day means before 6:00pm CT. Live launch blockers get a response within 60 minutes during coverage hours. Outside coverage hours, escalate launch owner → growth lead → director.

Launch channel threshold: create a temporary launch channel only when at least two are true: two or more functions must coordinate · hard launch or close date · daily coordination required · more than five active contributors · failure creates material revenue or customer impact.

03 · CLICKUP

Final ClickUp architecture

One workspace, three spaces. Nothing else at the top level.

SPACE	CONTAINS	JOB
HQ	Meetings & Agendas · Offers Registry · Issues & Decisions · Scorecards · SOPs and template index as Docs	Company operating system: decisions, standards, scorecards, the offer catalog
PODS	One folder per creator (Roan, Ariel, Justin), each with an Ongoing list, temporary campaign lists, and Backlog & Ideas	Each business unit's work, ongoing and campaign
PRODUCTION	Ads Engine · Design Studio · Split Test Lab	Shared craft queues serving every creator

Operating rules (non-negotiable):

- Company-specific work lives in the company folder. Shared craft lives in a central queue. Campaign work lives in a temporary campaign list.
- Acquisition paths are fields, not folders. One master task per unit of work. Related work is linked through dependencies and relationships, never copied.
- Every execution task has one assignee and a due date.
- Production tasks must carry Company/Creator, Offer, Entry Path, Ascension Target (when applicable), Campaign/Launch, Workstream, assignee, and due date.
- Health is tracked at the company or campaign level, not on every task.
- Waiting on External requires a "Waiting on" value: Creator, Vendor, Platform, or Internal Dependency.
- Statuses are workflow-specific per queue, never one universal set.
- Requests enter Design Studio through the form, never Slack DMs. True experiments only enter Split Test Lab.
- Completed campaign lists are archived after the debrief.
- Pilot manually before adding automations, dashboards, API scripting, or advanced reporting.

04 · BUILD

Exact build checklist

Work top to bottom. Nothing in this list requires an automation beyond the sales feed.

Slack (half a day)

- 01** Confirm the workspace is on a paid plan. Guest access, permanent history, and Workflow Builder all require it. If not, upgrade first.

- 02 Restrict channel creation to admins (Workspace Settings → Permissions → Channel creation). Ops and leadership are admins.
- 03 Rename existing channels per the mapping in section 05. Renaming, not recreating.
- 04 Create the remaining standing channels from section 02 that don't exist yet. Set each to public except the four private channels.
- 05 Paste the channel description template (section 19) into every channel, filled in. Pin the routing rule and house rules in each.
- 06 Set #announcements to admin-post-only (Channel settings → Posting permissions).
- 07 Create the #sales-feed incoming webhook (section 10). Do not announce the system yet; that is leadership's Day 3 move in the rollout guide.

ClickUp (one day)

- 01 Create the three spaces: HQ, PODS, PRODUCTION. Archive or move anything else out of the workspace root.
- 02 HQ: create lists Meetings & Agendas, Offers Registry, Issues & Decisions, Scorecards. Create a Docs area holding SOPs and the template index.
- 03 Populate Offers Registry: one entry per direct offer. Roan gets two records: **Booked-call core offer** (acquisition paths: Webinar → Book a Call, Workshop → Book a Call; ascension target: none) and **\$27 Blueprint** (acquisition path: \$27 Blueprint; ascension target: Booked-call core offer). Do not create registry entries for the webinar or the workshop; they are paths inside the core offer's record.
- 04 PODS: create the Roan folder with lists Ongoing and Backlog & Ideas. (Ariel and Justin folders are created at the Day-30 gate, not now: Roan pilots first.)
- 05 PRODUCTION: create Ads Engine, Design Studio, Split Test Lab.
- 06 Create the workspace custom fields from section 06 and attach them to PRODUCTION lists and PODS lists.
- 07 Set the workflow-specific statuses per queue from section 06.
- 08 Build the Design Studio intake form with the required fields (section 06). Turn it on and put its link in the #team-design channel description and bookmarks.
- 09 Do not build automations, dashboards, or reporting. Manual pilot first.

Channel creation, renaming, and archiving procedure

Rename mapping (history preserved)

CURRENT CHANNEL	BECOMES
Roan internal chat	<code>#creator-roan</code>
Roan comms	<code>#roan-comms</code>
Ariel internal chat (verify exact current name)	<code>#creator-ariel</code>
Ariel comms (verify)	<code>#ariel-comms</code>
Justin internal chat (verify)	<code>#creator-justin</code>
Justin comms (verify)	<code>#justin-comms</code>

Creating a channel

- 01 Only ops or leadership create channels. Anyone else proposes in #team-ops with one sentence: what it's for and why no existing room works.
- 02 Name it by the dictionary: lowercase, hyphens, creator-/ team-/ launch-/ private-prefix or -comms suffix. Launch channels carry -[YYYY-MM].
- 03 Paste the description template, filled. Pin the norms. Name the owner in the description.
- 04 Invite required members only. Optional members join themselves.

Archiving

- 01 Launch channels: within 7 days after the postmortem, post the closing [LEARNING] summary linking the ClickUp debrief, then archive. Archived channels stay searchable; archiving is not deleting.
- 02 Standing channels: at the monthly hygiene pass, any channel silent for 90 days goes on the review list. The owner gets one week to justify it; otherwise archive.
- 03 Never delete a channel. Never recreate an archived channel with the same name for a new purpose; a new month or purpose gets a new name.

Spaces, folders, lists, queues, fields, and statuses

Custom fields (workspace level)

FIELD	TYPE	VALUES	REQUIRED ON
Company/Creator	Dropdown	Roan · Ariel · Justin · [future creators]. HQ is not a value: HQ tasks are exempt from creator-specific fields	All PRODUCTION tasks, all PODS tasks
Offer	Dropdown	The offer this task directly supports. Mirrors the Offers Registry (Roan: Booked-call core offer, \$27 Blueprint). Extend from the Registry only	PRODUCTION tasks
Entry Path	Dropdown	Roan: Webinar · Workshop · \$27 Blueprint. Extend per creator from the Registry only	PRODUCTION tasks
Ascension Target	Dropdown	The next offer or action this path is designed to create. Roan: Booked-call offer · None	PRODUCTION tasks, when applicable
Campaign/Launch	Dropdown or relationship to the campaign list	One value per active campaign, matching the launch channel name	PRODUCTION tasks; campaign-list tasks
Workstream	Dropdown	Default set, confirm at sign-off: Ads · Email · Funnel · Content · Design · Sales · Ops	PRODUCTION tasks
Waiting on	Dropdown	Creator · Vendor · Platform · Internal Dependency	Any task in a Waiting on External status
Health	Dropdown	On Track · At Risk · Blocked	Company folder level and campaign lists only, never every task

The three-field model, worked. Offer is what the task directly supports. Entry Path is how the person arrived. Ascension Target is what this path is designed to create next. Tag Roan's work like this:

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
Sales call script	Booked-call offer	Webinar, Workshop, or Blueprint	None

The \$27 Blueprint is an Attraction Offer: it turns strangers into customers and creates a path toward the core offer. That is why it is the only Roan record carrying an Ascension Target.

DECISION REQUIRED • D5

The Workstream values and every status set below are buildable defaults, not spec. Confirm or amend them at Day-0 sign-off, then they are frozen for the pilot.

Statuses (workflow-specific, one set per queue)

QUEUE	STATUS FLOW (DEFAULT)
PODS · Ongoing	To Do → In Progress → Waiting on External → Review → Done
PODS · Campaign lists	To Do → In Progress → Waiting on External → Approved → Live → Done
Ads Engine	Concept → Copy → Creative → QA → Scheduled → Live → Debrief → Done
Design Studio	Intake → Briefed → In Progress → Review → Approved → Shipped
Split Test Lab	Hypothesis → Building → Running → Analyzing → Rolled Out / Killed
HQ · Issues & Decisions	Open → Discussing → Decided → Implemented

Design Studio intake form fields

- What is needed (one sentence) · where it runs · sizes/specs · deadline · Company/Creator · Offer · Entry Path · Ascension Target (when applicable) · Campaign/Launch · links to copy/brand assets · requester.
- Form submissions land in Intake. Anything that arrives by DM gets one reply: the form link (script in section 19).

Split Test Lab required fields (the test card)

Every experiment carries all fourteen. A task missing any of them is not an experiment and does not belong in the lab.

FIELD	WHAT IT CAPTURES
Current constraint	The company constraint this test attacks
Baseline	The current number we are trying to beat
Estimated economic impact	What winning is worth, in dollars
Hypothesis	If we change X, then Y, because Z
Variable changed	The one thing that differs
Control	What we are comparing against
Test version	The variant
Primary metric	One metric. Not three
Minimum sample, spend, or duration	What makes the read valid
Decision rule	The threshold that decides win or lose, set before the test runs
Owner	One name
Decision deadline	The date we call it either way
Next action if won	What ships
Next action if lost	What we do instead

The gate: if a test cannot be connected to the current constraint and a measurable business outcome, it does not enter the Split Test Lab.

Prioritization: score each candidate **Constraint Impact × Confidence × Ease of Execution**, each 1 to 5. Highest score runs first. Keep it that simple; no weighting schemes.

HQ lists, what each holds

- **Meetings & Agendas:** one task per recurring meeting, agenda built in the task, outcomes as comments, decisions promoted to Issues & Decisions.
- **Offers Registry:** one entry per **direct offer**. Each offer record lists its acquisition paths, ascension target, pricing, promise, funnel links, and CRM path names. Acquisition mechanisms are never registry entries of their own: Roan has exactly two records (Booked-call core offer, \$27 Blueprint), and Webinar → Book a Call, Workshop → Book a Call, and \$27 Blueprint → Booked-call core offer are listed *inside* them. Dropdown fields mirror this list; it is the only place a new offer value is born.
- **Issues & Decisions:** one task per decision or recurring issue. Slack [DECISION] messages link here. This is the decision archive the two-minute test depends on.
- **Scorecards:** one task per company + one per active campaign, carrying the Health field, updated weekly by the owner.
- **Docs:** SOPs and the template index. Durable knowledge lives here, not in Slack scrollback.

07 • TEMPORARY

Launch-channel and campaign-list rules

- A launch that clears the threshold (section 02) gets BOTH a Slack channel `#launch-roan-webinar-2026-09` and a ClickUp campaign list named to match: **Roan • Webinar • 2026-09**. Same name, two systems, zero ambiguity.
- Below the threshold: pinned thread in #creator-[name] and tasks in the folder's Ongoing list with the Campaign/Launch field set.
- The launch channel is internal. The creator hears about the launch in #[name]-comms.
- After the launch: run the debrief in the campaign list, post the closing [LEARNING] in the launch channel linking the debrief, archive the channel within 7 days, archive the campaign list after the debrief.
- Reruns never reuse rooms: January's webinar push is a new channel and a new list with the new month.

Slack-to-ClickUp handoff rules

- Slack surfaces and discusses work. ClickUp is the only place a commitment is assigned, scheduled, and tracked.
- The moment something has an owner and a deadline, it exists in ClickUp or it doesn't exist.
- A **[REQUEST]** without a ClickUp link is incomplete. The receiver's move is the bounce script (section 19), not silent acceptance.
- A **[DECISION]** that changes execution creates or updates a ClickUp task, SOP, or project brief, and the Slack message links to it. "Decision: ..." in Slack is the pointer, never the permanent source of truth. Durable knowledge belongs in the operating documentation.
- A thread is where a task is born, never where it lives. When a thread produces work, the owner creates the task and drops the link back in the thread.

CRM source-of-truth rules

- The CRM owns attribution, conversion, and revenue reporting. ClickUp never reports revenue. Slack never reconciles anything.
- Acquisition paths exist as CRM paths: Webinar → Book a Call and Workshop → Book a Call are tracked separately even though they feed the same core offer.
- The \$27 Blueprint is an Attraction Offer: track its conversion into the core booked-call offer as its own path. It is judged by who it converts, not what it collects.
- The HQ Offers Registry is the index of offers and paths; the CRM is the data. New path: Registry entry first, CRM path second, ClickUp dropdown value third. Same name in all three.

DECISION REQUIRED • D8

Confirm which system is "the CRM" for each creator's business unit before wiring the feed and reports. Do not assume one platform serves all three.

Sales-feed automation requirements

- 01 One incoming webhook posts to **#sales-feed**. Each funnel's payment platform triggers it (via Zapier or a native workflow webhook).
- 02 Message payload: amount · payment type · offer · creator · closer · setter · running daily total. Attribution comes from CRM/order fields.

- 03 No payment details and no sensitive customer information, ever: no card data, no emails, no phone numbers, no full customer names. The feed names our people, the offer, and the amount.
- 04 Refunds and cancellations post automatically, clearly marked, so the feed never reads better than reality.
- 05 High-ticket sales post individually. Low-ticket sales use digest mode by default (hourly rollup during launches, daily otherwise).
- 06 Slack celebrations never replace reconciliation. Finance reconciles from the payment platform and CRM, never the feed.
- 07 Test before launch: fire a test sale, a test refund, and a digest batch. Verify formatting, attribution, and that nothing sensitive leaks.

Sale: 💰 \$997 · PIF · [Offer] · Creator: Roan · Closer: [name] · Setter: [name] · Today
Refund: ↺ REFUND \$997 · [Offer] · Creator: Roan · Today net: \$13,243
Digest: 📄 \$27 Blueprint × 41 = \$1,107 this hour · Today: \$2,214

DECISION REQUIRED · D3

Confirm the trigger source per funnel (payment platform per offer path, per creator) and who owns the Zap/webhook account. The build is 30 minutes once named.

11 · ACCESS

Access and permissions

- **Slack admins:** ops + leadership. Only admins create channels and manage integrations.
- **Creators and their teams:** access to their own #[name]-comms channel only. Implement as multi-channel guests or Slack Connect. Review external access monthly.
- **Private channels:** membership lists owned by the channel owner, reviewed monthly. Need-to-know only.
- **#announcements:** posting restricted to leadership.
- **ClickUp:** internal team sees PODS and PRODUCTION. HQ visible to all internal staff except any list leadership restricts. Creators get no ClickUp access by default.

DECISION REQUIRED · D2

Guest accounts inside our workspace vs Slack Connect from the creator's own workspace. Both satisfy the standard; both require a paid plan. Pick one model for all three creators so the procedure is uniform.

Channel and project owner responsibilities

ROLE	OWNS
Channel owner	The description staying template-compliant · pinned norms current · friendly redirects · membership matching action responsibility · flagging the channel for archive when it goes quiet
Project owner	The ClickUp task/list being current · one assignee and due date on every execution task · the kickoff message naming them · the debrief happening
Launch owner	The launch channel + campaign list pair · daily [UPDATE] during launch week · monitoring for [BLOCKER]s inside the 60-minute bar · the postmortem and archive on schedule

One owner each. Two owners is zero owners.

DECISION REQUIRED • D4

Names. One owner per standing channel and per active project, written into descriptions before Day 1.

Weekly hygiene audit (15 minutes, ops)

- 01 Count unlabeled top-level work messages in work channels (spot-check 20).
- 02 Count [REQUEST]s missing ClickUp links. Bounce any found.
- 03 Count [BLOCKER]s that waited past the 60-minute bar during coverage hours.
- 04 List channels approaching 90 days of silence.
- 05 List campaign lists past their debrief without archive, and launch channels past 7 days post-postmortem.
- 06 Chase every Waiting on External older than 7 days: ping the owner with the "Waiting on" value.
- 07 Post the counts as one [UPDATE] in #team-ops. These six numbers are the Day-30 audit's raw data.

30-day rollout timeline

Day 0	Leadership sign-off: the map, the decision flags D1–D8, owner names, status defaults. Nothing builds before this.
Day 1	Slack build: renames, new channels, descriptions, pins, permissions, sales-feed webhook + tests.
Day 2	ClickUp build: spaces, HQ lists, Roan folder, PRODUCTION queues, fields, statuses, Design Studio form. Migrate Roan's live work into Ongoing / campaign lists.
Day 3	Leadership announces and trains using Document 2 (announcement, Loom, acknowledgment checklist). Pilot clock starts.
Days 3–17	Friendly-redirect era (two weeks). Weekly hygiene audits on days 7 and 14. Managers enforce per Document 2.
Days 18–30	Steady-state pilot. Hygiene audits days 21 and 28. Redirects continue but wrong-room work messages now get moved, not just answered.
Day 30	Audit against section 15. Pass → build Ariel and Justin folders, brief their teams, clone the system. Fail → fix the named friction, extend two weeks, re-audit. Never redesign mid-pilot.

DECISION REQUIRED • D7

Pilot scope. Recommended reading of the standard: Slack renames and channels go live for all three creators on Day 1 (they are renames of rooms that already exist), while the full ClickUp workflow pilots with Roan only for 30 days. Confirm, or hold Ariel/Justin Slack changes too.

Pilot pass/fail criteria (Day 30)

METRIC	PASS BAR (DEFAULT, CONFIRM DAY 0)	MEASURED FROM
Two-minute test	5 of 5 trials pass: a team member not on the pilot core finds a named conversation, owner, decision, and next action in under 2 minutes	Live drill at the audit
Wrong-room work messages	≤ 3 in week 4, trending down weekly	Redirect counts from hygiene audits
[REQUEST] ClickUp-link compliance	100% in week 4 (sample of 20)	Hygiene audit
Label usage on work posts	$\geq 90\%$ in week 4 (sample of 20)	Hygiene audit
Blocker SLA misses	0 in weeks 3–4	Hygiene audit
Commitments living only in Slack	0 found at audit	Audit sweep of pinned threads
Archive discipline	All launch channels archived ≤ 7 days post-mortem; campaign lists archived post-debrief	Channel + list review
Constraint identified weekly	4 of 4 weeks documented in HQ Meetings & Agendas	Monday agenda records
Test card completeness	100% of Split Test Lab experiments carry a complete test card	Split Test Lab review
Concluded experiments produced a decision	100%	Split Test Lab review
Random tests in the lab	0: every experiment traces to a named constraint	Split Test Lab review
Constraint attacked	≥ 1 test or corrective action prioritized against the biggest constraint each week	Monday/Friday records

Pass all twelve → roll to Ariel and Justin. Fail any → fix that specific item, extend two weeks, re-audit that item only.

16 • EDGE CASES

Troubleshooting and edge cases

SITUATION	HANDLING
A message concerns two creators	It's reusable learning or shared craft → #team-[function], with links dropped in each #creator channel if they must act
The creator DMs a team member with a request	Answer briefly, restate the request in #[name]-comms ("logging this here so it's tracked"), then create the ClickUp task. Never leave creator requests in DMs
The creator posts something internal-sensitive in -comms	Respond gracefully there; move the internal discussion to #creator-[name]. Never redirect the creator the way we redirect each other
Someone adds an external person to an internal channel	Remove immediately, channel owner posts a norms reminder, ops reviews external access
[REQUEST] arrives without a ClickUp link	Bounce with the script (section 19). The work does not start until the link exists
A blocker fires outside coverage hours	Tag the launch owner; escalate launch owner → growth lead → director. Log it in the campaign list next morning
Someone wants a launch channel below the threshold	Channel owner points at the two-of-five bar; work runs as a pinned thread + Ongoing tasks with the Campaign field
An archived launch is rerun	New channel and list with the new month. The old archive stays as the searchable record
Sensitive info posted in a public channel	Delete, repost in the right #private-[area], reply "moved to the right room" so the thread isn't a mystery
Two people claim or nobody claims ownership	Escalate to leadership same day. One name gets written down. Two owners is zero owners
Feed double-fires or misses a sale	Fix the automation; never hand-post corrections as fake sales. CRM remains truth regardless
A task is "waiting on the creator" for 7+ days	Waiting on = Creator; the account lead raises it in #[name]-comms with a dated, friendly nudge

Testing philosophy and the constraint loop

We are always testing, but we never test randomly. Every test must come from the company's biggest current constraint.

The weekly sequence, run in HQ:

- 01 Identify the constraint.
- 02 Quantify it.
- 03 Form a hypothesis.
- 04 Run the smallest valid test.
- 05 Measure one primary metric.
- 06 Make a decision.
- 07 Apply the learning.
- 08 Select the next test based on the next constraint.

This is what keeps the Split Test Lab from becoming a graveyard of interesting but economically irrelevant ideas.

Four things that get confused for each other

TYPE	DEFINITION	WHERE IT LIVES
Fix	Corrects something broken	Ongoing list or the campaign list
Iteration	Improves a known version based on prior results	Ads Engine or the relevant queue
Experiment	Controlled comparison under uncertainty	Split Test Lab, with a complete test card
Observation	A signal that does not yet qualify as a test	Backlog & Ideas, or a [LEARNING] post

An ad labeled "winner" is not automatically a split test. It enters the lab only when it has a hypothesis, a comparison, a metric, a decision rule, and a decision that changes future action.

18 · RHYTHM

Weekly operating rhythm

Two meetings, tracked as recurring tasks in HQ · Meetings & Agendas. Testing is continuous; randomness is not.

MONDAY MUST ANSWER	FRIDAY MUST ANSWER
What is the biggest constraint?	What concluded?
What evidence proves it?	What did we learn?
What test or corrective action attacks it?	What changed?
Who owns it?	Did the constraint improve?
When will we decide?	What is now the biggest constraint?
What outcome changes the plan?	

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. Decisions that change execution get filed to Issues & Decisions like any other.

19 · TEMPLATES

Copy-and-paste templates

Channel description

Purpose: [one sentence]
Required: [roles] · Optional: [roles]
Owner: @[name]
ClickUp: [link] · Docs: [link]
Response: [per house rule 7]
Not for: [the one thing people will get wrong]

Labels

[REQUEST] [what, one line]
Owner: @[name] · Deadline: [date] · Done means: [definition]
ClickUp: [link]

[DECISION] [decision, one line]
Owner: @[name] · Effective: [date] · Changes: [what changes]
Filed: [ClickUp/SOP link]

[BLOCKER] [what's blocked]
Can unblock: @[name] · Cost of waiting: [one line]

[UPDATE] [status vs plan, one line. No response needed.]

[LEARNING] Tried: [x] · Result: [y] · Next time: [z]

Request bounce (missing ClickUp link)

Happy to take this. Needs a ClickUp task first (owner, deadline, definition of done) so it doesn't get lost. Form/link: [link]. Ping me once it's in.

Design request redirect (from DM)

On it as soon as it's in the queue: [Design Studio form link].
DM requests skip the queue and get lost, the form doesn't.

Friendly redirect

Answered above 🙌 For next time this lives in [#channel] (routing rule: smallest room with everyone required to act).

Launch kickoff (pinned in the launch channel)

LAUNCH: [creator] · [initiative] · [YYYY-MM]
Launch owner: @[name] · Hard date: [date]
Campaign list: [ClickUp link] · Assets: [link] · Numbers: [link]
Daily [UPDATE] here by 10am CT. [BLOCKER]s answered within 60 min (9-6 CT).
External comms stay in #[name]-comms. Archive: ≤7 days after postmortem.

ClickUp master task

Title: [verb + deliverable]

Assignee: [one name] · Due: [date]

Fields: Company/Creator · Offer · Entry Path · Ascension Target,
when applicable · Campaign/Launch · Workstream

Description: outcome, links, definition of done

Related work: linked as dependency/relationship, never duplicated

Launch archive checklist

- ☐ Debrief run in the campaign list
- ☐ [LEARNING] posted in the launch channel, linking the debrief
- ☐ Reusable lessons copied to HQ Docs/SOPs
- ☐ Campaign list archived
- ☐ Channel archived (≤ 7 days post-postmortem)

Companion document: the Leadership Rollout and Team Training Guide covers the announcement, training, examples, enforcement, and the acknowledgment checklist. This guide changes only at an audit, from evidence of friction, never from preference.