

Week One Audit + Build Plan

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Date: August 20, 2026

Re: What I found, what I'm building, and when

The Bottom Line

Week one is done. I sat down with everyone, audited every process I could get my hands on, and started laying foundation.

The short version: we've got good people and offers that work. The machine around them is chaotic. Roles aren't defined, tasks don't always have a single owner, and we can't see our numbers clearly enough to know what to optimize.

All of it is fixable. Week two I build. I'll be leading the calls by the middle of next week. By weeks three and four we're operating a smooth, streamlined system, one that can take on new people and new clients without things falling through the cracks.

Sometimes you have to go slow to go fast. This was the slow week, and it was worth it.

What I Did This Week

- Hour-long calls with Amar and Hamza. Personal first: their goals, what makes them tick, how they like to be managed. Then the gaps they each see in the business.
 - Pulled stats (more on that adventure below) and audited ClickUp, Slack, the email setup, and how ads and creative get made today.
 - Built the per-offer calculator so we have clear economics and targets for every offer.
 - Started building the weekly ad research process.
 - Got the hiring pipeline moving: copywriter brief out, two creatives on trial tasks, funnel builder call tomorrow.
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What I Found

1. Nobody's fully clear on who owns what. Real example: I asked Amar for stats. Amar sent me to Hamza. Hamza sent me to Marenti. Marenti got me the stats. Nobody did anything wrong here, there's just no defined ownership. Amar and Hamza both flagged this on their own before I even asked. The fix: a roles and responsibilities doc for each person.

2. Tasks get assigned to the room, not a person. Hamza said it straight: when a ball gets dropped, it's usually because the task was never assigned to him personally. The fix: every task leaves a meeting with a Who, a What, a definition of Done, and a When. That's how I run meetings and it's coming with me.

3. We have systems, we just don't work the systems. ClickUp exists but the setup isn't right, and Slack is hard to keep up with. I've already started mapping what ClickUp should look like, but I'm not changing anything until Marenti and I adjust it together and the team buys in. The fix: a reworked ClickUp, a cleaner Slack structure, and a daily rhythm where we review what's due today, ask who needs support, and get verbal commitment on the spot ("okay cool, so you're good to finish this today?").

4. We're flying blind on the numbers that matter. No cohort view of day 0, 7, 14, and 30 revenue, so we don't truly know our CPA, CPCs, or lifetime value curve. We might be break-even on day 5 and sitting at 3-4x by day 14 or 15, and cross-selling after day 60 probably pushes it higher. Right now that's a guess, and it shouldn't be. Also missing: KPI benchmarks to strive for (Hamza asked for these directly, and he's right) and a true fully-loaded cost to acquire a customer with payroll and overhead averaged in. There's also a lack of clarity on what each person should be optimizing for. The per-offer calculator I built this week gets us a long way there.

5. Email is under-built. No proper site tracking, thin tagging, no real segmentation, and no consistent value cadence between promos. The play I run at Top One: four sends a day, each to a tight engagement segment (active, less active, opened in 30 days, clicked in 30 days, visited the site in 30 days). That protects deliverability, and those same segments get uploaded as custom audiences, which consistently outperform. I want auto-tagging on engaged subscribers so this runs itself. On cadence: Hamza's pushback is that he doesn't have time for daily emails. Candidly, I don't buy it. Value emails built around lead magnets don't take long, and even three a week builds reciprocity and keeps us top of mind. I'll also run a full deliverability audit.

6. Ads and creative have no system. Split testing is ad hoc right now (some manual analysis in Claude, and I can't verify the accuracy). Every offer should have a live split test running at all times. My understanding is we're also not sending buyer data back to Facebook, and I need to see the retargeting structure: are we building custom audiences off our best buyers, off behavior triggers like email clicks, or neither? I'm confirming all of this with Amar. Also missing: a weekly ad research process that surfaces winning angles and hooks we're not testing, and a clean pipeline for partner creative.

7. Clients don't have a real management layer. No account managers, and my understanding is most client comms run through your iMessage. That got us here, but it won't survive scale and it keeps you as the bottleneck. Proposal is in the asks below.

The Team

Hamza. What I love about Hamza: he genuinely wants to be a respectable marketer. He wants the creative strategist lane, working the ads side, and he agrees with me that our number one hire is a copywriter. How to get his best work: high stakes and tight constraints. He told me straight up that too much open space and he procrastinates, and that he thrives when the pressure is on. So instead of "get the full email sequence done this week," it's "here's the full week of sequences, first three buttoned up by tomorrow for feedback." He values feedback, so I've been reviewing and adjusting every email with him. A copywriter takes that over down the road. He also wants more data and clear benchmarks, which the scorecard and dashboard below solve.

Amar. Good personal download: his goals, his vision, what motivates him. On the business side he flagged the same clarity gaps Hamza did. Next step is a standing weekly 1:1 and a deep dive on the ad account: retargeting structure, custom audiences, and the buyer data question.

Marenti. In practice, the data lives with Marenti, including a dashboard I want to refine into a cross-department view so all of us can see what's going on and when. Marenti is also my partner on the ClickUp rework.

I'm setting up weekly 1:1s with each of them.

What I'm Building

OPERATING FOUNDATION

1. **Roles and responsibilities doc** for each person, so who-does-what is never a mystery again.
2. **Meeting operating system.** Every task gets a Who, a What, a definition of Done, and a When. Daily calls review what's due today, who needs support, and end with buy-in. Stats live in Slack and the dashboard, not in every meeting.
3. **ClickUp rebuild + Slack structure,** built with Marenti and rolled out with team buy-in.
4. **Weekly scorecard + management call.** Track all metrics across all offers and the company. Once a week we go over the stats, talk about what they actually mean, and pick the single biggest constraint to break that week. Same format I run at Top One, and it works. High-level version can just be you and me on Mondays.

DATA

5. **Cohort tracking:** day 0, 7, 14, 30 (and 60+ for cross-sell), so we know the real CPA and LTV curve instead of guessing.
6. **KPI benchmarks per offer,** paired with the calculator I already built.
7. **Fully-loaded CAC model** (needs payroll and overhead inputs from you).

8. **Dashboard v2** across all departments, building on what Marenti has.

MARKETING ENGINE

9. **Email engine:** site tracking, tagging, engagement segments, auto-tagging, custom audience syncing, deliverability audit, and a minimum 3x/week value cadence between promos.

10. **Weekly ad research report**, automated. It pulls high-performing ads (I use PowerAdSpy) and surfaces angles and hooks we're not thinking about, every week.

11. **Always-on split testing system.** Every offer has a live test at all times, tracked properly.

12. **Creative conveyor belt for partners.** They get a clear brief, upload to one place, it routes straight to our editors, and feedback flows back through the same system. No chasing.

13. **Retargeting rebuild + buyer data back to Facebook.**

14. **Instagram ManyChat flows.** We already have assets for this, we just need the content strategy around it.

CLIENT SYSTEMS

15. **Client onboarding imprint.** When a new client comes on, we build a voice document from their past emails and YouTube content, plus copywriting do's and don'ts and a market avatar, backed by an automated market research process. Every piece of copy we write for them runs through it, whether we're creating or refining.

16. **30-day launch system.** The vision: sign a new client and have their offer live inside 30 days. Most offers follow one of 4-5 funnel shapes (webinar, bootcamp, summit, \$27 front-end), so each becomes a ClickUp template. A new offer starts with an intake interview, and one click generates every project, task, and due date. Then we get buy-in on the dates as a team.

17. **Account manager structure**, so client comms come off your phone and clients get a dedicated point of contact.

Timeline

Week 1 (this week): audit. Done. Everything above, plus the hiring pipeline in motion.

Week 2 (Aug 24-28): build. Roles and responsibilities docs. Meeting OS live, and I take over leading the calls by Wednesday. ClickUp rework mapped with Marenti and bought in by the team. KPI scorecard v1 and the cohort tracking spec. Email deliverability audit done and segmentation build underway. First always-on split tests live. Retargeting and buyer-data answers with Amar. First weekly ad research report ships. Hiring decisions made: copywriter scope, keep/pass on both creatives, funnel builder verdict.

Week 3 (Aug 31 - Sep 4): operate. We run the new rhythm daily. Dashboard v2. Segments and auto-tagging live, custom audiences syncing. Value email cadence running. Creative conveyor belt v1. Client onboarding imprint documented and templated. ManyChat content strategy mapped. First full weekly scorecard call.

Week 4 (Sep 7-11): systemize launches. 30-day launch templates live in ClickUp with the intake workflow. Account manager proposal on your desk. Refine whatever squeaks. By the end of week 4 the goal is simple: a streamlined operation where we can add people and clients without dropping balls, and launch fast.

Hiring Pipeline

- **Copywriter (hire #1, Hamza and I both agree).** Brief is out to Mom Chill, a copywriter I've worked with and trust. He won't come on full time, but I'm getting his part-time capacity now and I'll report back. I have a few others I can reach out to as well. If you have anyone you rate, send them my way.
- **Creative.** The video editor delivers his first trial pieces tomorrow. The designer just got back from vacation, so his trial tasks go out now. I'll have a keep/pass read on both to see if it makes sense to bring someone like him on.
- **Funnel builder.** Call tomorrow, thanks for the intro.

What I Need From You

1. **Payroll and overhead numbers**, so I can build the true fully-loaded CAC model.
2. **A yes on the brain-dump pipeline.** You have a ton in your head and I want it in the system.
Simple version: you send a daily voice recap, AI transcribes and organizes it, it lands with me, and I turn it into tasks and workflows. Low effort on your end, big unlock on mine.
3. **Alignment on the account manager model**, and moving client comms off iMessage once it exists.
4. **Two minutes of public buy-in** when we roll out the ClickUp changes, so the team works the system instead of around it.
5. **Copywriter intros**, if you've got them.

That's week one: talking, listening, and finding the gaps. Next week I build. Then we run it.