

## KUSLER CONSULTING — OPERATIONS HUB

### OFFICIAL PRODUCT PLAN (v1)

#### 1) Vision & Positioning

A one-stop, mobile-first operations hub for small businesses that gives owners instant financial clarity and simple next steps — organized, automated, and in view. The hub showcases Kusler Consulting's capability to streamline workflows through automation, filing system streamlining, and AI-powered dashboards.

Brand tone: premium, calm, competent.

Design: immersive dark UI with embedded “Operations Hub” branding; mobile-first, desktop-polished.

#### 2) Primary Users

- Owner / Principal (core)
- Manager / Bookkeeper (optional)
- Viewer (optional)

#### 3) Goals & Outcomes

- Replace scattered tools with a single, always-current operations command center.
- Automate weekly brief emails and alerts so clients start each week ahead.
- Build trust with a secure, professional experience suitable for client work and demos.

#### 12) Core Automated Actions (System Behavior)

Operations Hub functions as a digital operations employee that continuously performs real tasks on behalf of the business owner. It operates 24/7 — tracking, organizing, alerting, and reporting — while Kusler Consulting oversees system health and makes adjustments as needed.

##### 1. Tracks Cash Flow Automatically

- Syncs incoming payments and outgoing expenses from connected apps (QuickBooks, Stripe, PayPal, or Google Sheets via Zapier).
- Updates dashboard tiles in real time showing Money In, Money Out, Net Cash, and Profit Snapshot.
- Feeds weekly email summaries (“Net +\$2,300 this week”).

Owner Result: Always knows where the money stands without opening spreadsheets.

##### 2. Monitors Upcoming Bills & Due Dates

- Watches open invoices and vendor bills through Zapier or manual entry.
- Displays what's due in the next 14 days, flags overdue items, and reminds owner automatically.

Owner Result: Prevents missed payments and maintains financial control.

##### 3. Generates Weekly Operations Brief (Email)

- Every Monday 8AM, compiles data from the prior week and delivers a personalized summary via Resend.

- Includes: Money In / Money Out, Current Available Cash, Coverage months, Highlighted tasks or overdue invoices.

Owner Result: Starts the week informed — like receiving a report from a staff member.

#### 4. Syncs and Files Key Documents

- Saves PDFs of invoices, receipts, and reports into linked Google Drive or Dropbox folders.
- Maintains consistent naming and folder structure for easy retrieval.

Owner Result: Digital paperwork automatically organized.

#### 5. Triggers Helpful Automations via Zapier

- Executes workflows automatically (mark invoice paid, log expenses, send reminders, post summaries).

Owner Result: Routine admin work completes itself without manual steps.

#### 6. Produces Live Business Reports

- Recalculates totals and updates charts dynamically (Cash Flow, A/R Aging, Monthly Profit).

Owner Result: One dashboard view shows real-time business performance.

#### 7. Offers Smart Insights (Planned AI Layer)

- Identifies anomalies (e.g., “utilities 20% higher than usual”). Forecasts next month’s cash flow.

Owner Result: Proactive decisions, not reactive corrections.

#### 8. Keeps the Owner Informed Automatically

- Weekly summaries, low-cash alerts, “All caught up” confirmations; optional Slack/text notifications.

Owner Result: Feels supported and informed without manual check-ins.

#### 9. Escalates Only When Needed

- Detects connection issues (e.g., Zapier auth expired) and alerts Kusler Consulting — not the client.

Owner Result: Continuous uptime with zero technical stress.

#### Summary Statement

Operations Hub behaves like a full-time operations assistant — tracking, updating, and communicating automatically. Kusler Consulting provides the managerial oversight to ensure it performs consistently, securely, and accurately.