

Systems Optimizer - Notion Workspace Template

Complete Interactive Learning System


Version: 1.0.0

Created: October 14, 2025

Purpose: Turn the Systems Optimizer roadmap into an actionable Notion workspace

Setup Instructions

Method 1: Manual Setup (Recommended - Full Control)

1. Create a new page in Notion called “ Systems Optimizer Journey”
2. Follow sections below to create each database and page
3. Copy content into respective pages
4. Customize to your workflow


Method 2: Import (If Notion supports markdown import)

1. Import this entire file as a page
 2. Convert sections to databases manually
 3. Add properties as specified
-

Main Dashboard Page Structure

SYSTEMS OPTIMIZER JOURNEY

PROGRESS AT A GLANCE

	Current Phase: [Phase 1]	
	Current Week: [Week 1 of 52]	
	Overall Progress: [2%] 	
	Hours Invested: [8 / ~500 total]	
	Projects Built: [0 / 30+]	
	Clients Landed: [0 / 5]	
	Revenue Generated: [\$0 / \$15K goal]	

**THIS WEEK'S FOCUS**

→ [Link to Current Week Plan](#)

**QUICK ACCESS**

- └ Learning Tasks Database →
- └ Projects Built Database →
- └ Skills Tracker Database →
- └ Resources Library →
- └ Client Pipeline (when ready) →
- └ Weekly Reviews Archive →

**MOTIVATION BOARD**

- └ Why I'm Doing This
- └ Success Metrics
- └ Wins Log
- └ Future Vision

**REFERENCE DOCS**

- └ Full Roadmap Reference
- └ Tool Cheat Sheets
- └ Troubleshooting Guide
- └ Community Resources

**Database 1: LEARNING TASKS****Database Properties:**

Property Name	Type	Options/Formula
Task Name	Title	-
Status	Select	Not Started, In Progress, Blocked, Complete
Phase	Select	Phase 1, Phase 2, Phase 3, Phase 4, Phase 5
Week	Number	1-52
Day	Number	1-7 (within week)
Priority	Select	High, Medium, Low
Estimated Hours	Number	-
Actual Hours	Number	-
Date Started	Date	-
Date Completed	Date	-
Tool/Platform	Multi-select	Zapier, Make, Airtable, APIs, JavaScript, Python, Notion, Other
Deliverable	Text	What you'll produce

Property Name	Type	Options/Formula
Notes	Text	Learning notes, blockers, insights
Resources	URL	Links to tutorials, docs
Related Project	Relation	Link to Projects database

Views to Create:

- 📌 **Current Week** (Timeline/Table)
 - Filter: Week = [current week number]
 - Sort: Day (ascending)
 - Show: Task Name, Status, Estimated Hours, Priority
- 📊 **By Phase** (Board/Kanban)
 - Group by: Phase
 - Sort: Week, then Day
 - Show: Task Name, Status, Week
- 🕒 **This Month** (Calendar)
 - Show: Date Started
 - Color by: Status
- ✅ **Completed** (Table)
 - Filter: Status = Complete
 - Sort: Date Completed (descending)
 - Show: Task Name, Actual Hours, Phase, Week, Date Completed
- 🚧 **Blocked** (Table)
 - Filter: Status = Blocked
 - Show: Task Name, Notes, Priority
- 📈 **Progress Timeline** (Timeline)
 - Show all tasks
 - Color by: Phase
 - Sort: Date Started

Sample Task Entries:

Phase 1, Week 1:

Task: Create Zapier Account

Status: Not Started

Phase: Phase 1

Week: 1

Day: 1

Priority: High

Estimated Hours: 0.25

Tool/Platform: Zapier

Deliverable: Active Zapier account on free plan

Notes: Sign up at zapier.com, verify email

Resources: <https://zapier.com>

Task: Complete "Getting Started with Zapier" Course

Status: Not Started

Phase: Phase 1

Week: 1

Day: 1-2

Priority: High

Estimated Hours: 2

Tool/Platform: Zapier

Deliverable: Course completion certificate

Notes: Take notes on triggers vs actions

Resources: <https://zapier.com/learn>

Task: Build First Automation - Gmail to Sheets

Status: Not Started

Phase: Phase 1

Week: 1

Day: 2

Priority: High

Estimated Hours: 1

Tool/Platform: Zapier

Deliverable: Working automation that saves starred emails to Google Sheet

Notes: Test with multiple emails, document steps

Related Project: Link to "Gmail Starred Email Tracker" project



Database 2: PROJECTS BUILT

Database Properties:

Property Name	Type	Options/Formula
Project Name	Title	-
Status	Select	Planning, Building, Testing, Complete, Failed
Type	Select	Personal Practice, Portfolio Piece, Free Client, Paid Client
Phase	Select	Phase 1, Phase 2, Phase 3, Phase 4, Phase 5
Tools Used	Multi-select	Zapier, Make, Airtable, APIs, JavaScript, Python, etc.
Complexity	Select	Beginner, Intermediate, Advanced
Date Started	Date	-
Date Completed	Date	-
Hours Invested	Number	-
Client Name	Text	(if applicable)
Project Value	Number	\$ amount charged
Problem Solved	Text	What pain point this addressed
Automations Count	Number	How many automations built
Time Saved (hrs/week)	Number	For ROI calculation

Property Name	Type	Options/Formula
Annual Value	Formula	prop("Time Saved (hrs/week)") * 50 * 52
Case Study Written	Checkbox	-
Screenshots Captured	Checkbox	-
Loom Recorded	Checkbox	-
Testimonial Received	Checkbox	-
Portfolio Ready	Checkbox	-
Documentation	Text	Link to Notion page or external doc
Lessons Learned	Text	What went well, what didn't
Would Do Differently	Text	Retrospective insights

Views to Create:

- 🎯 **Active Projects** (Board)
 - Filter: Status \neq Complete AND Status \neq Failed
 - Group by: Status
 - Sort: Date Started
- 🌟 **Portfolio Showcase** (Gallery)
 - Filter: Portfolio Ready = Checked
 - Sort: Date Completed (descending)
 - Show: Project Name, Tools Used, Time Saved, Screenshots
- 💰 **Client Work** (Table)
 - Filter: Type contains "Client"
 - Sort: Date Completed (descending)
 - Show: Project Name, Client Name, Project Value, Testimonial Received
- 📁 **By Tool** (Board)
 - Group by: Tools Used
 - Show: Project Name, Complexity, Status
- 📊 **ROI Tracker** (Table)
 - Show: Project Name, Time Saved, Annual Value, Project Value
 - Sort: Annual Value (descending)

Sample Project Entries:

Project Name: Gmail Starred Email Tracker
 Status: Complete
 Type: Personal Practice
 Phase: Phase 1
 Tools Used: Zapier, Google Sheets
 Complexity: Beginner
 Date Started: [Your start date]
 Date Completed: [When you finish]
 Hours Invested: 1
 Problem Solved: Track important emails for follow-up
 Automations Count: 1
 Time Saved (hrs/week): 0.5
 Case Study Written: ☐

Screenshots Captured: ☒

Documentation: [Link to documentation page]

Lessons Learned: Learned trigger setup, data mapping, testing workflow

Project Name: Personal CRM for Job Search

Status: Planning

Type: Personal Practice

Phase: Phase 1

Tools Used: Airtable, Zapier, Notion

Complexity: Intermediate

Problem Solved: Track job applications, follow-ups, networking contacts

Automations Count: 3 (planned)

1. Job posting saved → Create Airtable record
2. Set follow-up reminders
3. Track application status changes

Documentation: [Link to planning doc]






Database 3: SKILLS TRACKER

Database Properties:

Property Name	Type	Options/Formula
Skill Name	Title	-
Category	Select	Automation Platform, Database, Scripting, API, Dashboard, Business, Soft Skills
Proficiency	Select	Learning, Beginner, Intermediate, Advanced, Expert
Phase Introduced	Select	Phase 1, Phase 2, Phase 3, Phase 4, Phase 5
Importance	Select	Core (Must Have), Important, Nice-to-Have
Date Started	Date	-
Last Practiced	Date	-
Projects Used In	Relation	Link to Projects database
Times Used	Rollup	Count of linked projects
Learning Resources	Text	Links to courses, docs
Certification	Checkbox	-
Notes	Text	Key concepts, gotchas

Views to Create:

1. **Core Skills Status** (Table)
 - Filter: Importance = Core

- Group by: Category
- Sort: Proficiency
- Show: Skill Name, Proficiency, Last Practiced, Times Used
- 2.  **Currently Learning** (Board)
 - Filter: Proficiency = Learning OR Proficiency = Beginner
 - Group by: Category
 - Show: Skill Name, Phase Introduced
- 3.  **Mastered Skills** (Gallery)
 - Filter: Proficiency = Advanced OR Expert
 - Show: Skill Name, Times Used, Certification
- 4.  **Practice Needed** (Table)
 - Sort: Last Practiced (ascending)
 - Show: Skill Name, Last Practiced, Proficiency
 - Highlight skills not practiced in 2+ weeks

Sample Skill Entries:

Skill: Zapier - Basic Automations

Category: Automation Platform

Proficiency: Learning

Phase Introduced: Phase 1

Importance: Core (Must Have)

Learning Resources: Zapier Learn, YouTube tutorials

Notes: Trigger → Action flow, testing, error handling basics

Skill: Airtable - Database Design

Category: Database

Proficiency: Beginner

Phase Introduced: Phase 1

Importance: Core (Must Have)

Notes: Tables, fields, relationships, views, interfaces

Skill: REST APIs - Basic Understanding

Category: API

Proficiency: Learning

Phase Introduced: Phase 2

Importance: Important

Notes: GET/POST requests, authentication, reading API docs

Database 4: RESOURCES LIBRARY

Database Properties:

Property Name	Type	Options/Formula
Resource Name	Title	-
Type	Select	Course, Tutorial, Article, Video, Book, Community, Tool, Template

Property Name	Type	Options/Formula
Platform	Select	Zapier, Make, Airtable, YouTube, Blog, Reddit, Slack, Other
URL	URL	-
Relevant Phase	Select	Phase 1, Phase 2, Phase 3, Phase 4, Phase 5, Ongoing
Topic	Multi-select	Zapier, Make, Airtable, APIs, JavaScript, Business, Marketing, etc.
Cost	Select	Free, Paid, Freemium
Price	Number	If paid
Status	Select	To Review, In Progress, Completed, Reference
Priority	Select	High, Medium, Low
Date Added	Date	-
Date Completed	Date	-
Rating	Select	★, ★★, ★★★, ★★★★, ★★★★★, ★★★★★★
Time Investment	Select	<30min, 30min-1hr, 1-3hrs, 3-6hrs, 6+hrs
Key Takeaway	Text	Main insight or value
Notes	Text	Detailed notes

Views to Create:

- 📌 **This Phase** (Table)
 - Filter: Relevant Phase = [current phase]
 - Filter: Status ≠ Completed
 - Sort: Priority (High → Low)
 - Show: Resource Name, Type, Time Investment, Status
- ★ **Highly Rated** (Gallery)
 - Filter: Rating = ★★★★★★ OR ★★★★★
 - Show: Resource Name, Type, Topic, Key Takeaway
- 📁 **By Topic** (Board)
 - Group by: Topic
 - Show: Resource Name, Type, Rating, Status
- 📄 **Free Resources** (Table)
 - Filter: Cost = Free
 - Sort: Rating (descending)
- 📖 **Reading List** (Table)
 - Filter: Status = To Review OR In Progress
 - Sort: Priority, then Date Added

Sample Resource Entries:

Resource Name: Zapier Learn - Getting Started
 Type: Course
 Platform: Zapier

URL: <https://zapier.com/learn>

Relevant Phase: Phase 1

Topic: Zapier

Cost: Free

Status: To Review

Priority: High

Time Investment: 1-3hrs

Key Takeaway: Foundation for all Zapier work

Resource Name: Automation Hangout Slack

Type: Community

Platform: Slack

URL: <https://automationhangout.com>

Relevant Phase: Ongoing

Topic: Zapier, Make, Airtable, Automation

Cost: Free

Status: Reference

Priority: High

Key Takeaway: Active community for troubleshooting and networking

Database 5: CLIENT PIPELINE (Start in Phase 3)

Database Properties:

Property Name	Type	Options/Formula
Client Name	Title	-
Status	Select	Lead, Qualified, Proposal Sent, Negotiating, Won, Delivered, Lost
Type	Select	Free/Practice, Discount Pilot, Full Price
Source	Select	Referral, Community, Cold Outreach, Content, Marketplace, Other
Industry	Select	SaaS, Agency, E-commerce, Course Creator, Local Business, Other
Contact Name	Text	-
Email	Email	-
Phone	Phone	-
First Contact Date	Date	-
Proposal Sent Date	Date	-
Project Start Date	Date	-
Project End Date	Date	-
Project Value	Number	\$ amount
Payment Status	Select	Not Invoiced, Invoiced, Paid, Partial
Amount Paid	Number	-

Property Name	Type	Options/Formula
Problem Identified	Text	Their main pain point
Solution Proposed	Text	What you'll build
Tools Needed	Multi-select	Zapier, Make, Airtable, etc.
Estimated Hours	Number	-
Actual Hours	Number	-
Profitability	Formula	<code>prop("Amount Paid") - (prop("Actual Hours") * 50)</code>
Testimonial Received	Checkbox	-
Testimonial Text	Text	-
Referral Potential	Select	Low, Medium, High
Next Follow-Up	Date	-
Notes	Text	-
Related Project	Relation	Link to Projects database

Views to Create:

- 🎯 **Active Pipeline** (Board)
 - Filter: Status \neq Delivered AND Status \neq Lost
 - Group by: Status
 - Sort: First Contact Date
- 💰 **Revenue Tracker** (Table)
 - Show: Client Name, Status, Project Value, Amount Paid, Payment Status
 - Sort: Project Start Date (descending)
 - Footer: Sum of Amount Paid
- 📞 **Follow-Up Queue** (Calendar)
 - Show: Next Follow-Up date
 - Filter: Status \neq Delivered AND Status \neq Lost
- ★ **Success Stories** (Gallery)
 - Filter: Testimonial Received = Checked
 - Show: Client Name, Project Value, Testimonial Text
- 📊 **By Source** (Board)
 - Group by: Source
 - Show conversion rates



WEEKLY REVIEW TEMPLATE

Create a template page with this structure (duplicate each week):

Week [X] Review - [Date Range]

📊 Progress Metrics

- Hours invested this week: __
- Total hours to date: __
- Tasks completed: __ / __
- Current completion: __%

✅ What I Accomplished

- [] Task 1
- [] Task 2
- [] Task 3

🛠️ What I Built

- Project name: __
- Tools used: __
- Time invested: __
- Status: __

🎓 What I Learned

- New skill: __
- Key insight: __
- Aha moment: __

🚧 Challenges & Blockers

- Challenge: __
- How I solved it (or seeking help): __

🎯 Wins (Big & Small)

- Win 1: __
- Win 2: __
- Win 3: __

🔄 What I'd Do Differently

- Learning: __
- Adjustment: __

📅 Next Week Plan

Focus Areas:

- Primary: __
- Secondary: __

Specific Tasks:

- [] Task 1 (X hours)
- [] Task 2 (X hours)
- [] Task 3 (X hours)

Expected Outcomes:

- Deliverable: __
- Skill gain: __

💭 Reflections

- Energy level: __ / 10
- Confidence level: __ / 10
- Motivation: __ / 10
- What energized me: __
- What drained me: __
- Adjustments needed: __

📊 Pipeline Updates (Phase 3+)

- New leads: __
- Conversations had: __
- Proposals sent: __
- Projects won: __
- Revenue this week: \$__

🎯 MONTHLY MILESTONE TEMPLATE

Create a template for end-of-month reviews:

Month [X] Milestone Review - [Month Name]

🎯 Month Goal Review

****Goal 1:**** [From roadmap]

- Status: ☐ Not Met / ☐ Partially Met / ☐ Fully Met / ☐

Exceeded

- Evidence: __

****Goal 2:**** __

- Status: __
- Evidence: __

****Goal 3:**** __

- Status: __
- Evidence: __

📊 Metrics Dashboard

Metric	Target	Actual	Status
Hours Invested	__	__	✓/x
Tasks Completed	__	__	✓/x
Projects Built	__	__	✓/x
Skills Levelled Up	__	__	✓/x
Clients Contacted	__	__	✓/x
Revenue Generated	\$__	\$__	✓/x

🏆 Major Accomplishments

1. __
2. __
3. __

🎓 Skills Gained

- Moved from Learning → Beginner: __
- Moved from Beginner → Intermediate: __
- New tools added: __

📚 Portfolio Growth

- Projects completed: __
- Case studies written: __
- Testimonials received: __
- Portfolio ready pieces: __

💰 Business Development (Phase 3+)

- Leads generated: __
- Proposals sent: __
- Projects won: __
- Total revenue: \$__
- Average project value: \$__

🚧 Challenges Overcome

- Challenge: __
- How solved: __
- Lesson learned: __

🔄 Course Corrections

- What's not working: __
- Adjustment: __
- New approach: __

📅 Next Month Preview

****Primary Focus:**** __

****Key Milestones:****

1. __
2. __
3. __

****Skills to Develop:**** __

****Projects to Complete:**** __

💭 Self-Assessment

- Am I on track? ☐ Yes / ☐ Ahead / ☐ Behind
- Energy/motivation: __ / 10
- Confidence: __ / 10
- Do I still want this? __
- What needs to change? __

🎯 PHASE COMPLETION CHECKLIST

Create a page for each phase with this checklist:

Phase 1: Foundation (Months 1-2)

Phase 1 Completion Checklist

🎓 Core Learning

- ☐ Completed Zapier fundamentals course
- ☐ Completed Make Academy basics
- ☐ Completed Airtable foundation training
- ☐ Built 10+ practice automations
- ☐ Understand triggers vs actions
- ☐ Can read basic API documentation

🛠️ Projects Delivered

- ☐ Gmail → Google Sheets automation
- ☐ Calendar → Task manager automation
- ☐ Form → Notification automation
- ☐ Built personal CRM in Airtable
- ☐ Created 3 personal workflow automations
- ☐ Documented all projects with screenshots

📚 Skills Achieved

- ☐ Zapier: Beginner → Intermediate
- ☐ Make: Learning → Beginner
- ☐ Airtable: Learning → Beginner
- ☐ Can troubleshoot basic automation errors
- ☐ Understand data mapping
- ☐ Can test automations properly

📖 Resources Completed

- ☐ Reviewed 10+ tutorial videos
- ☐ Joined Automation Hangout community
- ☐ Joined NoCode Ops
- ☐ Started following 5+ experts
- ☐ Bookmarked 20+ helpful resources

🎯 Phase Readiness

- ☐ Can explain how Zapier works to non-technical person
- ☐ Can build simple automation in under 30 minutes
- ☐ Have portfolio of 5+ working automations
- ☐ Feel confident in basic troubleshooting
- ☐ Ready to tackle more complex projects

****Phase 1 Completion Date:**** _____

****Overall Phase Rating:**** __ / 10

****Biggest Win:**** _____

****Main Lesson:**** _____

****Ready for Phase 2?**** ☐ Yes / ☐ Need More Time (specify: __)

Phase 2: Application (Months 3-4)

Phase 2 Completion Checklist

🎓 Core Learning

- [] Learned complex Make scenarios
- [] Learned custom JavaScript in Zapier
- [] Learned webhook basics
- [] Learned API integration via Make
- [] Understand error handling patterns
- [] Can design relational databases in Airtable

🛠️ Projects Delivered

- [] Career tracking system built
- [] Content pipeline automation
- [] Personal dashboard created
- [] 3 multi-step automations working
- [] At least 1 webhook integration
- [] Built automation for a real workflow problem

📚 Skills Achieved

- [] Zapier: Intermediate
- [] Make: Beginner → Intermediate
- [] Airtable: Beginner → Intermediate
- [] APIs: Basic understanding
- [] Can calculate ROI for automations
- [] Can document workflows clearly

🎯 Portfolio Development

- [] First case study written (even if personal project)
- [] Screenshots captured for 5+ projects
- [] Started documenting methodology
- [] Can explain value proposition clearly
- [] Have before/after time saved metrics

🎯 Phase Readiness

- [] Can build most common business automations
- [] Can estimate project complexity
- [] Can scope a project based on client description
- [] Have starter portfolio to show
- [] Ready to work with real clients

****Phase 2 Completion Date:**** _____

****Overall Phase Rating:**** __ / 10

****Biggest Win:**** _____

****Main Lesson:**** _____

****Ready for Phase 3?**** ☐ Yes / ☐ Need More Time (specify: __)

Phase 3: First Client (Months 5-6)

Phase 3 Completion Checklist

🎓 Client Skills

- [] Conducted 3+ stakeholder interviews
- [] Created 3+ workflow audit documents
- [] Delivered 3+ professional presentations
- [] Written 3+ clear SOPs
- [] Recorded 3+ Loom walkthroughs
- [] Managed client expectations successfully

🛠 Projects Delivered

- [] Free practice client project completed
- [] First paid project completed (\$500-750)
- [] 2-3 automations delivered per client
- [] Documentation delivered to clients
- [] Follow-up conducted after 2 weeks

📚 Skills Achieved

- [] Client interviewing
- [] Requirement gathering
- [] Scope definition
- [] Professional communication
- [] Project documentation
- [] Time estimation (getting better)

🎯 Portfolio & Credibility

- [] 2+ client testimonials received
- [] 2+ case studies written
- [] Before/after metrics documented
- [] ROI stories ready to share
- [] Portfolio site or page created

💰 Business Operations

- [] Created pricing structure
- [] Have proposal template
- [] Have contract template
- [] Set up invoicing system
- [] Tracking time and expenses

🎯 Phase Readiness

- [] Delivered real value to real clients
- [] Received positive feedback
- [] Can scope and price projects
- [] Have repeatable process
- [] Ready to scale up pricing

****Phase 3 Completion Date:**** _____

****Overall Phase Rating:**** __ / 10

****Biggest Win:**** _____

****Main Lesson:**** _____

****Ready for Phase 4?*** ☐ Yes / ☐ Need More Time (specify: __)

Phase 4: Skill Deepening (Months 7-9)

Phase 4 Completion Checklist

🎓 Advanced Skills

- [] Learned webhooks deeply
- [] Can use Make's HTTP module confidently
- [] Basic JavaScript competency
- [] Can read and use API documentation independently
- [] Advanced Airtable (formulas, scripts, automations)
- [] Multi-step logic flows mastered

🛠 Projects Delivered

- [] 3+ clients at \$1,500-2,500 each
- [] More complex integrations delivered
- [] Custom solutions built (not just templates)
- [] Handled edge cases successfully
- [] Fixed broken automations

📚 Skills Achieved

- [] Zapier: Intermediate → Advanced
- [] Make: Intermediate → Advanced
- [] Airtable: Intermediate → Advanced
- [] APIs: Intermediate
- [] Can learn new tools quickly
- [] Efficient at troubleshooting

🎯 Portfolio & Credibility

- [] 5+ case studies total
- [] 5+ testimonials
- [] Applied to Zapier Experts (if eligible)
- [] Applied to Make Partners
- [] Active in communities (answering questions)

💰 Business Growth

- [] Raised prices to \$2K-3K range
- [] Have steady pipeline (5+ leads at various stages)
- [] Getting referrals
- [] Revenue: \$5K-10K total earned
- [] Efficient delivery process (templates, SOPs)

🎯 Phase Readiness

- [] Can handle most automation requests
- [] Efficient and profitable

- [] Have market presence
- [] Pipeline generating consistently
- [] Ready to scale and specialize

****Phase 4 Completion Date:**** _____

****Overall Phase Rating:**** __ / 10

****Biggest Win:**** _____

****Main Lesson:**** _____

****Ready for Phase 5?**** ☐ Yes / ☐ Need More Time (specify: __)

Phase 5: Professional Practice (Months 10-12)

Phase 5 Completion Checklist

🎓 Professional Mastery

- [] Expert in core stack (Zapier, Make, Airtable)
- [] Can learn new tools in 1-2 days
- [] Understand when to use which tool
- [] Can architect complex systems
- [] Known for specific niche/expertise

🛠 Projects Delivered

- [] 5+ projects at \$3K-5K each
- [] First retainer client (\$1.5K-3K/month)
- [] Delivered complex multi-system integrations
- [] Handled difficult edge cases
- [] Built scalable solutions

📚 Skills Achieved

- [] All core tools: Advanced/Expert
- [] Specialized in specific industry or use case
- [] Can estimate accurately (within 10%)
- [] Fast delivery (efficient templates/processes)
- [] Thought leadership developing

🎯 Portfolio & Credibility

- [] 10+ case studies
- [] 10+ testimonials
- [] Listed in platform directories
- [] Active thought leadership (content/community)
- [] Referred regularly

💰 Business Established

- [] \$5K-10K monthly revenue
- [] 2-3 new clients per month consistently
- [] 1-2 retainer clients
- [] Total revenue: \$30K-60K in year

- [] Sustainable pipeline

🎯 Professional Status

- [] Can confidently call myself a Systems Optimizer
- [] Have proven track record
- [] Command premium rates
- [] Choose clients (not desperate)
- [] Clear specialty/positioning

🚀 Year 2 Planning

- [] Decided on specialization path
- [] Plan for scaling (team? productize? course?)
- [] Revenue target for Year 2: \$_____
- [] Skills to master in Year 2: _____

****Phase 5 Completion Date:**** _____

****Overall Phase Rating:**** __ / 10

****Biggest Win:**** _____

****Main Lesson:**** _____

****Professional Status Achieved?**** ☐ Yes / ☐ Still Growing

****Year 1 Overall Rating:**** __ / 10

****Total Revenue Year 1:**** \$_____

****Ready for Year 2 Growth?**** ☐ Yes



MOTIVATION & WHY PAGE

Create a page to revisit when motivation wanes:

Why I'm Becoming a Systems Optimizer

🎯 Primary Goal

[Write your main reason - money, freedom, intellectual challenge, helping businesses, etc.]

💰 Financial Target

- Year 1: \$_____
- Year 2: \$_____
- Year 3: \$_____

****What this money enables:****

- _____
- _____

- _____

🌟 Lifestyle Goals

- Work location: _____
- Work schedule: _____
- Time off: _____
- Flexibility: _____

🧠 Intellectual Fulfillment

What excites me about this work:

- _____
- _____
- _____

🎁 Impact Goals

How I want to help clients:

- _____
- _____
- _____

📅 Timeline Commitment

- Start date: _____
- Phase 1 target completion: _____
- First client target: _____
- Full-time transition target (if applicable): _____

🚫 What I'm Leaving Behind

(Job, situation, pain points I want to move away from)

- _____
- _____
- _____

✅ Success Criteria

I'll know I've succeeded when:

1. _____
2. _____
3. _____

💭 Future Vision

Where I see myself in 2 years:

[Write a paragraph about your future state]

🔥 When Motivation Dips

Remind myself:

- _____
- _____
- _____

Accountability buddy: _____

Review this page: Every Monday morning



WINS LOG (Quick Capture Database)

Create a simple database to log every win, no matter how small:

Database Properties:

Property	Type
Win Description	Title
Date	Date
Category	Select: Learning, Building, Client, Revenue, Recognition, Personal
Size	Select: Small, Medium, Big, HUGE
Feeling	Select: 😊 Happy, 🎉 Excited, 😎 Proud, 💪 Confident, 🙏 Grateful
Related To	Text

Sample Entries:

Win: Built first working Zapier automation

Date: [Today]

Category: Building

Size: Medium

Feeling: 🎉 Excited

Related To: Phase 1, Week 1

Win: Client said "This is exactly what I needed!"

Date: __

Category: Client

Size: Big

Feeling: 😎 Proud

Related To: First paid client project

Win: Made first \$500 as a Systems Optimizer

Date: __

Category: Revenue

Size: HUGE

Feeling: 💪 Confident

Related To: Phase 3 milestone

View this database when you feel like quitting.



DETAILED TASK BREAKDOWN

Phase 1, Week 1 - Full Task List

Copy these into your Learning Tasks database:

Day 1 - Zapier Foundation

- ☐ Create Zapier account (15min)
 - ☐ Watch Zapier intro video (30min)
 - ☐ Start "Getting Started with Zapier" course (1hr)
 - ☐ Build first test Zap: Gmail star → Google Sheets (1hr)
 - ☐ Test automation with 5 emails (30min)
 - ☐ Document what you learned (15min)
- TOTAL: 3.5 hours

Day 2 - Zapier Practice

- ☐ Continue Zapier course (1.5hrs)
 - ☐ Build automation 2: Calendar event → Task app (1hr)
 - ☐ Build automation 3: Form submit → Email notification (1hr)
 - ☐ Learn about filters and paths (30min)
 - ☐ Test all automations (30min)
 - ☐ Update documentation (30min)
- TOTAL: 5 hours

Day 3 - Make Introduction

- ☐ Create Make account (15min)
 - ☐ Watch Make intro videos (1hr)
 - ☐ Start Make Academy fundamentals (1.5hrs)
 - ☐ Build same Gmail automation in Make (compare to Zapier) (1hr)
 - ☐ Note differences between Make and Zapier (15min)
- TOTAL: 3.75 hours

Day 4 - Make Practice

- ☐ Continue Make Academy (1.5hrs)
 - ☐ Build calendar automation in Make (1hr)
 - ☐ Build form automation in Make (1hr)
 - ☐ Learn Make's router (branching logic) (1hr)
 - ☐ Documentation update (30min)
- TOTAL: 5 hours

Day 5 - Airtable Introduction

- ☐ Create Airtable account (15min)
- ☐ Watch Airtable basics videos (1hr)
- ☐ Explore Airtable Universe templates (1hr)
- ☐ Copy and customize a CRM template (1.5hrs)

- ☐ Learn about views and filters (1hr)

- ☐ Documentation (15min)

TOTAL: 4.75 hours

Day 6 - Integration Practice

- ☐ Build automation: Form → Airtable (Zapier) (1hr)

- ☐ Build same automation in Make (compare) (1hr)

- ☐ Create Airtable views for data analysis (1hr)

- ☐ Learn Airtable formulas basics (1hr)

- ☐ Build mini-project: Job tracker with automation (2hrs)

TOTAL: 6 hours

Day 7 - Week 1 Review & Planning

- ☐ Complete Week 1 review template (1hr)

- ☐ Test all automations built this week (1hr)

- ☐ Organize documentation and screenshots (1hr)

- ☐ Plan Week 2 learning (30min)

- ☐ Celebrate wins! (Log in Wins database)

TOTAL: 3.5 hours

WEEK 1 TOTAL: ~31.5 hours

If doing 8-10 hrs/week: Spread these over 3-4 weeks

Phase 1, Week 2 - Full Task List

Day 1 - Advanced Zapier

- ☐ Learn Zapier Formatter (text, date, number manipulation) (2hrs)

- ☐ Build automation using Formatter (1hr)

- ☐ Learn Zapier Filter (conditional logic) (1hr)

- ☐ Build automation with branching (2hrs)

TOTAL: 6 hours

Day 2 - Advanced Make

- ☐ Learn Make's data transformation tools (2hrs)

- ☐ Build complex scenario with multiple paths (2hrs)

- ☐ Learn error handling in Make (1hr)

- ☐ Add error handling to previous automations (1hr)

TOTAL: 6 hours

Day 3 - Airtable Deep Dive

- ☐ Learn Airtable relationships (linked records) (1.5hrs)

- ☐ Build relational database (Companies → Contacts → Deals) (2hrs)

- ☐ Learn Airtable automations (built-in) (1hr)

- ☐ Create Airtable interface (dashboard) (1.5hrs)

TOTAL: 6 hours

Day 4 - API Basics (Theory)

- ☐ Watch "What is an API?" videos (1hr)
- ☐ Read API basics articles (1hr)
- ☐ Understand REST, GET, POST concepts (1hr)
- ☐ Review sample API documentation (1hr)
- ☐ Take notes on key concepts (1hr)

TOTAL: 5 hours

Day 5 - API Practice

- ☐ Find a simple API (e.g., weather, quotes) (30min)
- ☐ Use Make's HTTP module to call API (2hrs)
- ☐ Use Zapier's Webhooks to call API (2hrs)
- ☐ Build automation that uses API data (1.5hrs)

TOTAL: 6 hours

Day 6 - Build Complex Project

- ☐ Plan a multi-step automation project (1hr)
- ☐ Design database structure in Airtable (1hr)
- ☐ Build automation flow (3hrs)
- ☐ Test thoroughly (1hr)
- ☐ Document (1hr)

TOTAL: 7 hours

Day 7 - Week 2 Review

- ☐ Complete Week 2 review (1hr)
- ☐ Portfolio update with new projects (1hr)
- ☐ Skills tracker update (30min)
- ☐ Plan Week 3 (30min)

TOTAL: 3 hours

WEEK 2 TOTAL: ~39 hours



QUICK REFERENCE - TOOL CHEAT SHEETS

Zapier Quick Reference

Create a page with:

Zapier Cheat Sheet

Common Triggers

- **Schedule:** Run automation on a schedule
- **New Email:** Gmail, Outlook
- **New Row:** Google Sheets, Airtable
- **New Form Response:** Google Forms, Typeform

- **Webhook:** Receive data from external source

Common Actions

- **Create Row:** Add to spreadsheet/database
- **Send Email:** Gmail, Outlook, Email by Zapier
- **Create Task:** Todoist, Asana, ClickUp
- **HTTP Request:** Call any API
- **Webhook:** Send data to external source

Formatter Functions

- **Text:** Split, replace, truncate, capitalize
- **Date/Time:** Format, add/subtract time
- **Numbers:** Perform calculations
- **Utilities:** Pick from list, line items

Filters & Paths

- **Filter:** Continue only if conditions met
- **Paths:** Branch into multiple routes based on conditions

Tips & Tricks

- Always test with real data
- Name your Zaps descriptively
- Use folders to organize
- Set up error notifications
- Monitor task usage

Common Gotchas

- Date format mismatches
- Empty fields breaking automations
- API rate limits
- Task limits on free plan
- Time zone confusion

Make Quick Reference

Make (Integromat) Cheat Sheet

Key Concepts

- **Scenario:** An automation workflow
- **Module:** A step in the scenario
- **Router:** Split execution into multiple paths
- **Iterator:** Loop through array items
- **Aggregator:** Combine multiple items

Common Modules

- **HTTP:** Call any API
- **JSON:** Parse JSON data
- **Text Parser:** Extract data from text
- **Tools:** Set variables, sleep, compose

Data Transformation

- **map():** Transform array items
- **get():** Extract specific value
- **formatDate():** Format dates
- **if():** Conditional logic

Error Handling

- **Error Handler Route:** What to do if module fails
- **Commit:** Save partial results
- **Rollback:** Undo partial changes

Tips & Tricks

- Use data stores for persistence
- Implement error handling on critical modules
- Use scenario execution history for debugging
- Blueprint: Save and reuse scenarios
- Test with manual trigger first

Common Gotchas

- Operations count differently than Zapier tasks
- Looping can consume many operations
- Time zone handling
- Array vs single item confusion

Airtable Quick Reference

Airtable Cheat Sheet

Field Types

- **Single Line Text:** Short text
- **Long Text:** Paragraphs
- **Number:** Integers or decimals
- **Single Select:** One option from list
- **Multiple Select:** Multiple options
- **Link to Another Record:** Relationships
- **Lookup:** Pull data from linked record
- **Rollup:** Aggregate linked records
- **Formula:** Calculate based on other fields
- **Checkbox:** True/false
- **Date:** Dates with optional time

Common Formulas

IF(condition, value_if_true, value_if_false) CONCATENATE(text1, text2, ...)
 DATETIME_DIFF(date2, date1, 'unit') SUM(array) COUNT(array) AND(logical1, logical2, ...) OR(logical1, logical2, ...)

Views

- **Grid:** Spreadsheet view
- **Form:** Data entry form
- **Calendar:** See date fields

- ****Gallery:**** Card view
- ****Kanban:**** Board grouped by select field
- ****Timeline:**** Gantt chart

Automations (Built-in)

- Trigger: When record created, updated, matches view
- Actions: Create record, update record, send email, webhook

Tips & Tricks

- Use views to create multiple perspectives on same data
- Color code records with conditional formatting
- Use grouped records for organization
- Link tables for relational power
- Use interfaces for client-facing dashboards

Common Gotchas

- Free plan: 1,200 records per base limit
- Formulas can be slow on large bases
- Linked records count toward record limit
- Automation runs count toward monthly limit

EMERGENCY RESOURCES

Create a page titled “When I’m Stuck”:

 When I'm Stuck - Emergency Resources

Zapier Issues

1. Check Zapier Status: status.zapier.com
2. Search Zapier Community: community.zapier.com
3. Read error message carefully (they're usually accurate)
4. Test each step individually
5. Ask in Automation Hangout Slack: #zapier channel

Common Solutions:

- Reconnect the app integration
- Check data format (text vs number)
- Verify API permissions
- Check for empty required fields

Make Issues

1. Check Make Status: status.make.com
2. Search Make Community: community.make.com
3. Review scenario execution history
4. Check operations consumed
5. Ask in Automation Hangout Slack: #make channel

Common Solutions:

- Map the correct data fields

- Add iterator for arrays
- Check JSON structure
- Verify HTTP request format

Airtable Issues

1. Check Airtable Status: status.airtable.com
2. Search Airtable Community: community.airtable.com
3. Check formula syntax
4. Verify field types
5. Ask in [r/Airtable](https://www.reddit.com/r/Airtable)

Common Solutions:

- Check field type compatibility
- Verify linked record relationships
- Check view filters (record might be hidden)
- Formula syntax (case-sensitive)

API Issues

1. Read the API documentation CAREFULLY
2. Test in Postman first
3. Check authentication (API key, OAuth)
4. Verify endpoint URL
5. Check rate limits

Common Solutions:

- Wrong HTTP method (GET vs POST)
- Missing authentication header
- Incorrect JSON structure
- Wrong content-type header

General Debugging Process

1. ****Identify:**** What's the exact error?
2. ****Isolate:**** Which step is failing?
3. ****Test:**** Test that step independently
4. ****Research:**** Google the exact error message
5. ****Ask:**** Post in community with details
6. ****Document:**** Once solved, document for future

Community Help Template

When asking for help, provide:

- What you're trying to do
- What you expected to happen
- What actually happened
- Error message (exact text)
- Screenshots
- What you've already tried

Take a Break Protocol

If stuck for 2+ hours:

1. Step away for 30 minutes
2. Explain problem out loud (rubber duck debugging)

3. Start from scratch
4. Ask for help (don't waste more than 2-3 hours alone)
5. Move to different task, circle back tomorrow

Expert Help Options

****When DIY isn't working:****

- Post job in Automation Hangout: #opportunities
- Hire expert for 30min consult (\$50-100)
- Book office hours with Zapier/Make expert
- Check if tool has official support

****Remember:**** Everyone gets stuck. It's part of learning. The goal is to get unstuck faster each time.

GETTING STARTED CHECKLIST

Create a page called “ SETUP CHECKLIST”:

Setup Checklist - Start Here!

Notion Workspace Setup

- [] Create main dashboard page
- [] Create Learning Tasks database (with all views)
- [] Create Projects Built database (with all views)
- [] Create Skills Tracker database (with all views)
- [] Create Resources Library database (with all views)
- [] Create Weekly Review template page
- [] Create Monthly Milestone template page
- [] Create Motivation & Why page (fill it out!)
- [] Create Wins Log database
- [] Create Phase Completion Checklist pages (1-5)
- [] Create Emergency Resources page
- [] Create Tool Cheat Sheets pages

Tool Accounts Setup

- [] Create Zapier account (free)
- [] Create Make account (free)
- [] Create Airtable account (free)
- [] Create Google account (if don't have)
- [] Create Loom account (free)
- [] Set up password manager for all accounts

Community Joining

- [] Join Automation Hangout Slack
- [] Join NoCode Ops newsletter + Slack
- [] Join r/zapier on Reddit
- [] Join r/nocode on Reddit
- [] Join r/airtable on Reddit
- [] Join Indie Hackers (for later)

- ☐ Follow 5+ automation experts on Twitter/LinkedIn

Learning Resources Bookmarked

- ☐ Zapier Learn: zapier.com/learn
- ☐ Make Academy: make.com/en/academy
- ☐ Airtable Universe: airtable.com/universe
- ☐ Bookmark 5+ helpful YouTube channels
- ☐ Bookmark API basics tutorial

Business Prep (For Later)

- ☐ Choose business name (or use your name)
- ☐ Set up simple accounting system (Wave is free)
- ☐ Create email signature
- ☐ Draft "elevator pitch" (what you do in 1 sentence)
- ☐ Set up LinkedIn profile (if using for outreach)

Phase 1, Week 1 Loaded

- ☐ Copy all Week 1 tasks into Learning Tasks database
- ☐ Set status to "Not Started"
- ☐ Set dates based on your schedule
- ☐ Create "Week 1" page with daily breakdown
- ☐ Block time in calendar for learning (8-10 hours)

Final Setup Steps

- ☐ Review Motivation & Why page
- ☐ Set Monday reminder to do weekly review
- ☐ Set end-of-month reminder for milestone review
- ☐ Tell accountability buddy you're starting
- ☐ Take "before" snapshot (current skills, confidence

level)

🎯 Ready to Start?

- ☐ I've completed all setup above
- ☐ I've blocked time in my calendar
- ☐ I've filled out my "Why" page
- ☐ I'm committed to this journey
- ☐ Let's go! → Start Phase 1, Week 1, Day 1

****Official Start Date:**** _____

****Planned Phase 1 Completion:**** _____

****First Client Target Date:**** _____

🌟 You're ready! Go to Week 1 page and check off your first task.

Remember: You don't need to be perfect. You just need to start.

Every expert was once a beginner. Today is Day 1 of your Systems Optimizer career.

FINAL NOTES

How to Use This Template:

1. **Don't build it all at once:** Start with main dashboard + Learning Tasks database + Week 1 page
2. **Add databases as needed:** Create Projects database when you build first project, Clients database when you get first lead
3. **Customize freely:** This is a starting point. Adjust to your style.
4. **Don't over-organize:** Spending 10 hours on perfect Notion setup = procrastination. Spend 1-2 hours, then START LEARNING.
5. **Review and iterate:** Your Notion system will evolve. That's good.

Minimum Viable Setup (if short on time):

Just create: 1. Main dashboard page 2. Learning Tasks database (with Current Week view) 3. Week 1 task list 4. Motivation page

That's enough to start. Add the rest as you go.

Key Success Metrics to Track:

Track these weekly in your review: - Hours invested - Tasks completed - Projects built - Skills leveled up - Leads contacted (Phase 3+) - Revenue generated (Phase 3+)

These 6 numbers tell you if you're on track.

When to Review This System:

- **Daily:** Check off completed tasks, log wins
 - **Weekly:** Complete weekly review, plan next week
 - **Monthly:** Complete milestone review, check Phase progress
 - **Quarterly:** System review (what's working, what's not?)
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This Notion system is your command center. Your roadmap is the plan. Your Notion workspace is the execution engine.

Now go build it and start checking off tasks!

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For use with: Systems Optimizer Complete Learning Roadmap v1.0