

SuiteDash BOS Master Playbook

1. Core Philosophy

SuiteDash serves as the Business Operating System (BOS) that unifies all operations across your ventures. It acts as the central nervous system, ensuring that client acquisition, onboarding, service delivery, and reporting are all streamlined and managed from one hub. By adopting SuiteDash as your BOS, you create consistency, accountability, and scalability across all your service businesses, directories, and SaaS products.

2. System Architecture

The BOS system architecture flows as follows: Frontends → Lead Capture & Intake → SuiteDash BOS → Service Delivery & Automations → Reporting & Analytics - Frontends: Websites built with Lovable.dev, GroovePages, BrilliantDirectories, and Directorist (WordPress). - Lead Capture: Intake forms via SuiteDash, Acumbamail email opt-ins, Prefinery/UpViral campaigns. - BOS Core: SuiteDash handles CRM, pipelines, automations, client portals, billing, and communication. - Service Delivery: Automations built with Zapier, n8n, Make/Boost.Space, Activepieces, and KonnectzIT. - Reporting: SEO insights, heatmaps, and sales data via NeuronWriter, TruConversion, and SalesNexus.

3. Key BOS Use Cases

a) Client Portals & Onboarding: - Multi-tenant portals, each white-labeled under YourDeputy or niche brands. - Standardized onboarding pipelines including intake forms, welcome emails, auto-provisioned portal access, onboarding checklists, and automated project linking. - Extended lead times (3x standard) allow a single person to manage high client volume. b) Directory + CRM Integration: - Directory frontends (BrilliantDirectories/WordPress) feed lead data into SuiteDash CRM via automation tools. - Pipelines manage stages from Prospect → Qualified → Onboarded → Active Client. - Premium directory members get portal access, ensuring continuous engagement. c) Micro-SaaS BOS Patterns: - Example: TradeEase CRM for local trades. - Modules: CRM, scheduling, invoicing, contracts, project management. - Stack: Stripe (billing), Calendly (appointments), Acumbamail (emails), Zapier/n8n (automation).

4. Automation Blueprints

Automations provide scale and remove manual overhead. Core automations include: - Lead Routing: Acumbamail → SuiteDash pipelines. - Directory Integration: BrilliantDirectories → KonnectzIT/n8n → SuiteDash. - Payment Automation: Stripe/ThriveCart → Zapier → SuiteDash project + billing record. - Email Campaigns: Blog content (NeuronWriter) → Acumbamail → nurture sequences in SuiteDash. - Service Delivery: Deal stage changes trigger automated tasks, projects, or pipelines. Advanced Automations: - Auto-provision memberships based on payment events. - Automated reminders for invoices, renewals, or project milestones. - Data sync between SuiteDash and external analytics platforms.

5. Monetization Models

Revenue models for SuiteDash BOS: 1. Subscription Packages: - Directory memberships with tiered benefits. - SaaS services like TradeEase CRM offered on recurring monthly packages. 2. High-Ticket Offers: - BOS consulting and implementation as a service, sold to external businesses. 3. Cross-Sells & Upsells: - Premium dashboards, advanced templates, automation bundles. - Affiliate marketing via embedded campaigns in SuiteDash portals.

6. Constraints & Workarounds

SuiteDash limitations: - No API for custom development. - Limited branding: login page and deep system branding cannot be white-labeled. - Fixed structure for certain modules (CRM, portals).
Workarounds: - Custom frontends with WordPress/Lovable.dev. - Automation bridges (Zapier/n8n) for missing API endpoints. - Branded experiences delivered via embedded forms and emails, hiding SuiteDash limitations from end users.

7. Playbooks & Templates

Playbooks standardize BOS deployment. Each playbook includes: - CRM categories (Accounting, Legal, Real Estate, Healthcare, Trades, Marketing, etc.). - Onboarding checklist templates for clients. - Import-ready pipelines, project templates, email sequences, dashboards. - Copywriting in Alex Hormozi / Russell Brunson style to maximize conversions. Deliverables include PDF playbooks and SuiteDash templates ready for import.

8. Execution Roadmap

Phase 1 – Core Setup: - Configure SuiteDash BOS (YourDeputy) with universal pipelines, intake forms, and portals. Phase 2 – Integrations: - Automate lead sync via Zapier/n8n. - Connect billing, email, and directory systems to SuiteDash. Phase 3 – Templates: - Import CRM playbooks across 12+ business categories. - Configure standard onboarding checklists and project templates. Phase 4 – Monetization: - Package offers into recurring tiers (\$500–\$1,000/month). - Cross-sell add-ons and affiliate campaigns through portals. Phase 5 – Scaling: - Replicate BOS for each directory or SaaS venture. - Add AppSumo tools for niche-specific value and automation.