ChatGPT

# SuiteDash OS Implementation: Hormozi + ProcessDriven

## 1. Preparation and Planning

- **Define Objectives & Roles:** Outline the client's core services and goals. Map out major processes (e.g. Sales, Delivery, Marketing) using a **Process Org Chart** to identify every key activity [1]. Assign high-level roles (e.g. Sales Lead, Content Creator, Ops Manager, Process Owner) and decide who (or what, e.g. automation) owns each.
- **Naming Conventions:** Establish clear naming rules up front. For example, prefix templates and lists by function (e.g. *"Offer – [Name]"*, *"SOP – [Task Name]"*, *"Proj: [Client] Onboarding"*). Use consistent terms (e.g. "Proposal", "Deal", "Project") and status labels to avoid confusion. This ensures clarity as the system scales.

## 2. SuiteDash Setup

- **Portal Branding & Custom URL:** In *Platform Branding*, connect your domain, add your logo, and set colors. Customize the login page and email branding. This ensures a white-label client portal that reflects your brand [2] [3].
- **Staff Roles & Circles:** Create Staff Roles (for internal users) and Circles (for grouping clients). For instance, set up roles like **Sales**, **Account Manager**, **Content Lead**, **Process Owner**. Use Circles to group clients by plan or segment (e.g. "Basic Clients", "Premium Clients") which helps in permissions and messaging.
- **Custom Menus:** Use **Advanced Custom Menus** to tailor navigation. For internal users, show items like "Projects", "Tasks", "Improvement Pipeline"; for clients, show only "My Projects", "Support", "Resources". Hide irrelevant sections by role [3]. For example, create a top-level menu "Resources" linking to Portal Pages or Forms. This makes the portal intuitive and enforces process discipline.

## 3. Data Structure & Content Libraries

- **Custom Fields:** Define any needed custom fields (e.g. *"Offer Name"*, *"Referral Source"*, *"Client Segment"*, *"KPI Value"*). These fields can be used on Deals, Contacts, or Tasks to capture Hormozi's value-drivers (e.g. *"Dream Outcome"*) and ProcessDriven metadata. Use them in Forms and automated placeholders [2].
- **Folder Generators:** Set up Folder Generator templates for different contact types (e.g. Lead, Prospect, Client). Each client's Shared Folder can auto-create subfolders like `Contracts`, `Deliverables`, `Proof & Testimonials`, and especially an **SOPs** subfolder for that client if relevant [4]. This standardizes where to store files and SOP documents for each project.
- **SOP Library:** Build a central SOP library for internal processes. Use a **Portal Page** or dedicated Folder (e.g. "COMPANY SOPs") to index all procedures. Document each process as a concise SOP (step-by-step guide) and link to it from a master menu or wiki page. SuiteDash's Portal Pages can

host formatted guides or process maps [5] [6]. For example, create a Portal Page "SOP Index" with links titled "SOP – Client Onboarding", "SOP – Social Media Content", etc.
- **Process Org Chart:** Create and maintain a Process Org Chart (diagram of all processes and roles). Upload this diagram as an image file or Portal Page. It serves as your system's blueprint [1]. Reference this chart in staff onboarding and portal resources. Keeping it updated ensures everyone understands how each SOP fits into the bigger picture.

## 4. Forms and Work Requests

- **Client Intake Form:** Create a **General Form** to capture new client details (scope, goals, budget). This form feeds data into the CRM (Contacts) and can trigger automations (e.g. assigning a Sales Rep). Template library allows saving form templates [7].
- **Referral/Proof Request Forms:** Build forms for **Referrals** and **Testimonials**. For example, after project success send a "Refer a Colleague" form asking client to enter a referral's info. Likewise, use a testimonial form to collect results (the "proof" Hormozi emphasizes). These form responses can be attached to the client's record or stored as files, centralizing proof collection.
- **Work Request Forms:** If clients request new work, have a "Work Request" form. SuiteDash lets clients submit requests that convert directly into Projects or Estimates [8]. This streamlines new tasks and ties them into your process (e.g. add an improvement idea to the pipeline automatically).

## 5. Pipelines and Project Templates

- **Sales/Deal Pipeline:** Use **Deals (Advanced)** to track prospects through stages (e.g. *Lead* → *Qualified* → *Proposal Sent* → *Won/Lost*). Label stages with actionable descriptions (e.g. "Proposal (Dream Outcome defined)"). Use custom fields on Deals for Hormozi's Value Equation (e.g. *"Dream Outcome"*, *"Likelihood to Win"*, *"Time to Deliver"*). Automate moving deals: when a proposal is signed, trigger a project template (client onboarding) and send a welcome email. Deals provide the visual pipeline Hormozi uses to manage scaling of revenue [9].
- **Content Pipeline:** For marketing/content, create either a **Deals pipeline** or a **Task list** workflow (via a Project) that tracks ideas to published content. Stages might be *Ideas* → *Writing* → *Review* → *Published*. Assign a **Content Lead** role to create content checklist tasks (e.g. "Write Blog", "Design Graphic", "Schedule Post") using Project Templates. This ensures content creation is process-driven.
- **Improvement Pipeline:** Implement an **"Improvements" pipeline** (could be a Deals pipeline or a Kanban Project). Each card is an idea or issue (from team or client feedback). Stages like *Submitted* → *Designing SOP* → *Implemented* → *Reviewed*. Link each to responsible owner and due date (cadence). Use custom fields for impact or ROI. This embodies Pomper's continuous improvement: ideas are documented and processed through a repeatable pipeline [10].
- **Project Templates:** For repetitive work (like client onboarding, account reviews, or launching campaigns) create **Project Templates** with pre-defined Phases and Tasks [11]. For example, an "Onboarding" template with phases *Kickoff Call*, *Deliverables Setup*, *First Month Review*. Set tasks with dependencies so later tasks unlock only after earlier ones finish. This captures your SOP into action steps, making projects consistent. Use the Template Library to save/share these templates [7].
- **Recurring Tasks:** For regular governance (e.g. weekly team huddles, monthly KPI reviews) use **Events** and Tasks. SuiteDash Events can be recurring calendar reminders [12] (e.g. a "Monthly Ops Review" event every 1st Monday). You can also make a "Governance Project" with recurring tasks: use **Checklists** to tick off agenda items. For example, a weekly "Management Meeting" task with

checklist: review KPIs, pipeline statuses, and ongoing improvement tasks. Calendar events ensure everyone sees the schedule, enforcing the governance rhythm [12] [13].

## 6. Automations and Flows

- **Trigger/Action Automations:** Use **Automated Workflows** (Flows or custom triggers) to tie processes together [14]. For example: when a Deal moves to "Won", trigger a Flow that adds the client to a Circle, creates an Onboarding Project from your template, and sends a welcome email. Or, when a content task is marked complete, auto-publish to social media (via email marketing campaign). SuiteDash's **Trigger/Action** system can update fields, change status, send messages, etc., allowing "one-click" automated systems [14].
- **Flow Sequences:** Build multi-step **Flows** for client journeys. E.g. an automated drip: after onboarding call, send a "Getting Started" docs (Portal Page), then after 7 days send a satisfaction survey. Flows can incorporate forms and file uploads. Use **Checklists** in flows to ensure the client completes each step of a process (e.g. watching training videos or submitting needed files) [14].
- **Task Dependencies:** For complex projects, set **Task Dependencies** so tasks unlock in sequence [14]. This enforces process order: e.g. in product delivery, "Review Draft" can only be done after "Write Draft" is complete. This prevents jumping ahead and ensures all SOP steps are followed.
- **Governance Automations:** Automate process audits. For instance, every quarter trigger a Flow that creates tasks to review and update key SOPs or to audit sales and improvement pipelines. Use email templates to notify process owners when their process is due for review. This embeds the cadence of improvement into the system.

## 7. Client Portal and Custom Content

- **Portal Pages for Resources:** Create Portal Pages for client-facing content (e.g. "Welcome to the Client Hub", "Knowledge Base", FAQs). Embed video tutorials, charts, or SOP excerpts here [5]. For instance, host a page on "How We Deliver Value" that explains your Value Equation approach. Portal Pages can be templated and reused [7].
- **Friendly URLs & Menus:** Use **Friendly URLs** for important links (e.g. `/offer-builder`, `/sop-library`) to make them easy to communicate. Put key Portal Pages in the custom menu for clients under headings like "Resources" or "Account" [5] [3]. Only expose what's relevant: clients don't need to see your internal "Improvement Pipeline" menu.
- **Interactive Forms and Surveys:** Embed forms in the portal for self-service (e.g. request a consultation, submit feedback). For example, a "Request New Feature" form that feeds directly into the Improvement Pipeline. Use client-side flows for things like lead capture (prospects can fill a form to sign up for an offer, which creates a Deal automatically).

## 8. Hormozi Teachings Integration

- **Value Equation Focus:** Capture Hormozi's **Value Equation** in workflows [15] [16]. Tag each offer or project with its "Dream Outcome" and maximize perceived value. E.g., in Deal or Proposal templates include fields for *Dream Outcome* and guarantees. Automate communications to highlight key benefits (freebies, speed, convenience). *"Sell Hawaii, not the plane ride"* – ensure proposals emphasize outcomes over processes [15].
- **Scaling by Eliminating Constraints:** Use data in SuiteDash to find bottlenecks. For example, if Deals often stall in "Proposal", set an automation reminder to the sales team or trigger a coaching Flow.

Follow the Theory of Constraints: identify the slowest stage in your pipelines and allocate resources there [17]. Regularly review pipeline metrics (SuiteDash dashboards) and reduce delays (minimize *Time Delay* from Hormozi's equation).

- **Offer Builder Processes:** Create a **Project Template** for developing new offers. Phases could include *Brainstorm*, *Market Research*, *Pricing Strategy*, *Testing*. Use custom fields to score offers by value. This mirrors Hormozi's systematic approach to creating $100M offers. When a new offer is ready, use SuiteDash to distribute it: send emails, update landing pages, and track uptake.
- **Content System:** Implement a content calendar as a project or pipeline. Assign tasks (ideation, draft, design, publish) to roles. Use the Email Marketing Toolkit for newsletters/blog digests. Automate social posting via email campaigns. This enforces consistency, fulfilling Hormozi's emphasis on high-quality content production.
- **Proof & Testimonials:** After milestones, trigger a form to collect results/testimonials. Store client success stories as files and link them on the portal (e.g. a "Case Studies" landing page). Use these in proposals and marketing. Automate sending a thank-you plus referral request once a testimonial is submitted to capitalize on momentum.
- **Referral Engine:** Automate a referral pipeline. For example, when a Deal closes won or a project finishes, auto-email the client a referral form. Create a "Referrals" Deals pipeline to track these leads. Use checklists to ensure the sales rep follows up on each warm referral. This embeds Hormozi's referral strategy into the OS.
- **Ascension & Upsells:** Track client lifetime value and sequence of offers. Use SuiteDash to schedule upsell campaigns: e.g. after 3 months of service, trigger a task to pitch an advanced package. Manage this in the CRM with custom fields (e.g. *Next Offer Date*). Automations can create tasks for Account Managers to review upsell opportunities periodically.

## 9. Governance Rhythms & Continuous Improvement

- **Cadence of Work (Governance Rhythms):** Assign cadences to each process using Events and recurring tasks. For instance, create a weekly "Sales Standup" event and a monthly "Process Review" event in the Calendar [12] [13]. Use these to review pipelines and SOPs. Defining "when" each process is executed builds routine and accountability [13].
- **KPI Tracking:** Use custom fields or task metrics to record key performance indicators. Automate summary reports: e.g. at month's end, send an email with sales figures, funnel conversion rates, or content metrics. Reviewing these in your governance meetings closes the feedback loop for improvement [10].
- **Issue & Idea Logging:** Encourage team to log problems or ideas as tasks or deals. For example, use a shared portal page or ticket system (Support Tickets feature) to log issues. Convert these into the Improvement Pipeline for action. This captures on-the-job learnings and feeds them into the "record ideas" advice from ProcessDriven [10].
- **Documentation Updates:** Make SOP updates a recurring task. For every Process or Project Template, schedule a quarterly review task (via Automations or Calendar) for the owner to revise instructions. This keeps your documentation fresh as your business evolves.

## 10. Step-by-Step Configuration Guide

1. **Initialize SuiteDash:** Sign up for the Pinnacle plan. In *Platform Branding*, configure domain, logo, colors, portal look and templates [5] [2]. Enable the Template Library for Portal Pages and Forms [18].

2. **Create Users & Roles:** Add internal Staff accounts. Define Staff Roles (e.g. Admin, Project Manager, Staff). Create Circles for any client grouping strategy [12].
3. **Configure CRM:** In CRM settings, ensure Company logic, default roles, and assign default pipelines. Define custom fields (in Settings → Custom Fields) for Offer Name, Referral, etc.
4. **Build Pipelines:** Go to *CRM* → *Pipeline Stages* (or *Projects/Deals*) and create your sales pipeline. Set each stage and automation triggers. Add separate pipelines for content and improvement as needed.
5. **Set up Portals & Menus:** Under *Platform Builder* → *Custom Menus*, create menus for Clients (limit to Client areas like Projects, Files, Tickets) and Internals (show all). In *Portal Pages*, build an "Internal Dashboard" page linking to SOPs, the Process Org Chart image, and improvement pipeline. Create a "Client Dashboard" page with links to their projects, resource links, and contact form.
6. **Create Forms:** In *Forms*, add templates for Client Intake, Feedback, Referrals, and Work Requests. Use the Template Library if needed [7]. Embed these forms in Portal Pages or email flows.
7. **Design Project Templates:** In *Project Management*, create templates. Example: *Template – Client Onboarding* with phases (Discovery Call, Setup, Review). Assign default users (roles) and relative due dates. Similarly make templates for content or SEO tasks.
8. **Set up Automation Flows:** In *Automations*, create new Workflows. For example, trigger on "New Client" (filled intake form) → create Deal and Project, assign tasks. Create a Flow for "Project Complete" → send referral request email. Use Checklists within Flows to track multi-step tasks. Save common flows as Action Templates for reuse [14].
9. **Folder and File Structure:** Enable Folder Generators. Define a client folder structure (e.g. `01 - Contracts`, `02 - Projects`, `03 - SOPs`, `04 - Testimonials`). Test by creating a dummy client to auto-generate folders [4].
10. **Training & Governance:** Document these processes in Portal Pages or Wiki. Schedule a "SuiteDash Rollout" project for your team with tasks: train on each section (CRM, Projects, Portal), migrate key data, and assign owners. Use Calendar Events for recurring reviews (e.g. "SuiteDash Governance Meeting" monthly).

## 11. Maintenance and Growth

- Regularly review usage (SuiteDash has a **Live Stream/Notifications** feed to audit actions). Update templates and automations as the business scales.
- Use the **Template Library** to save refined templates and share them across accounts or the community [7].
- Continuously capture feedback in the system (via Support Tickets or feedback forms) and iterate.

By following this structured setup – embedding Hormozi's value-driven offerings and Pomper's process discipline into SuiteDash's features – you create a robust, scalable Operating System. Each step and template is reusable: new clients get the same automated onboarding, every team member follows clear SOPs, and improvements flow systematically. This integrated SuiteDash OS ensures both predictable growth and operational excellence [15] [4].

**Sources:** SuiteDash documentation and features [4] [5] [14]; Alex Hormozi's Value Equation [15] [16]; Acquisition.com Scaling principles [17] [19]; ProcessDriven methodology [1] [6] [10] [13].

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