



Six Systems of a Practice

Where your agents go, and the written job you hand them



Marketing ●

Clips and posts from your calls

- READS** The recording of a call or talk, and its transcript.
- PRODUCES** Short clips, and a handful of post drafts for each one, in your voice.
- YOUR YES** You approve every post. Nothing goes out without it.

Sales ●

A follow-up after every call

- READS** The call summary and what you already know about that person.
- PRODUCES** One follow-up draft per person, ready to read.
- YOUR YES** You read it and say send. It never sends itself.

Fulfillment ○

An onboarding report from the call

- READS** What the client said they want, and what they bought.
- PRODUCES** A one-page report: what they want, and what to do first.
- YOUR YES** You check it before it shapes the work.

Management ●

A morning digest and task notice

- READS** Your calendar, your task list and yesterday's notes.
- PRODUCES** One page each morning: what needs you today, and what is due.
- YOUR YES** It tells you. You decide what gets done.

Money ○

A cash snapshot

- READS** The invoices and bank figures you give it, as copies.
- PRODUCES** One page: cash in, cash out, and what is due this week.
- YOUR YES** It reports. It never moves money. You pay.

Intelligence ●

Call summaries into a shared vault

- READS** Every call recording, once it is filed.
- PRODUCES** A summary of what people said, filed where every agent can read it.
- YOUR YES** You read it before anyone acts on it.



The written job

Like the genie in the lamp, an agent does exactly what you say. So say it well. Seven lines, in your own words.

An example: The post writer's file

Who you are	The post writer, in the marketing section.
Your role	Turn the best moments of my calls into posts, in my voice.
Why it matters	You being here allows me to help people transform the way they do work.
Done looks like	A post I would sign, ready for my yes.
What you never do	Publish. You draft; I approve.
What you may spend	Nothing. If a job needs money, stop and ask me first.
When you finish, tell me	What you drafted, where it is waiting, and anything you were not sure about.

NOW YOURS

Who you are

Your role

Why it matters

Done looks like

What you never do

What you may spend

When you finish, tell me