# EQUIPPED

Property Management Technology

# Operations Strategic Plan

30 / 60 / 90-Day Roadmap, Operating Systems & SOP Framework

Prepared by: Operations Specialist (Founding Operations Hire)

Scope: Pre-launch operational build-out for a B2B SaaS proptech platform

Objective: Stand up proactive client operations, risk management, support, and revenue-retention systems before go-live

*Confidential — Internal Strategy Document*



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# Contents

Contents ..... 2
1. Executive Summary ..... 4
What This Plan Delivers ..... 4
2. Current-State Assessment ..... 5
Organizational Reality ..... 5
The Core Risks of Doing Nothing ..... 5
3. The 30 / 60 / 90-Day Roadmap ..... 6
Phase 1 — Days 1–30: Listen, Map & Stabilize ..... 6
Phase 2 — Days 31–60: Build & Systematize ..... 8
Phase 3 — Days 61–90: Scale, Test & Hand Off ..... 9
4. New Client Account Workflow ..... 10
The Lifecycle Stages ..... 10
Onboarding Checklist (Stage 3 detail) ..... 10
5. Risk-Flag & Account-Health System ..... 12
Account Health Status Model ..... 12
Early-Warning Triggers (Risk Flags) ..... 12
Escalation Path ..... 12
6. Support Ticket Operation ..... 14
The Ticket Flow ..... 14
Priority Tiers & Target SLAs ..... 14
Bug / Engineering Hand-Off Template ..... 14
Support Metrics to Track ..... 15
7. Revenue Retention & Growth Plan ..... 16
The Revenue Metrics That Matter ..... 16
Account Management Workflow ..... 16
Book-of-Business Communication Plan ..... 16
Quarterly Business Review (QBR) ..... 17
Account Health & Relationship Strategy ..... 17
8. Standard Operating Procedure (SOP) Library ..... 18
SOP Template (applied to every procedure) ..... 18
Priority SOPs to Build (mapped to the roadmap) ..... 18
9. New-Hire & Contractor Standards ..... 20
New-Hire Onboarding Path ..... 20



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

Contractor / Vendor Management Standard ..... 20
What “Good” Looks Like for the Operations Function ..... 20
10. Success Metrics Dashboard ..... 22
Operational KPIs ..... 22
Revenue KPIs ..... 22



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 1. Executive Summary

Equipped is a pre-launch B2B SaaS proptech platform that helps landlords manage rentals through a single app: tenant screening, rent collection, maintenance coordination, contractor sourcing, and financial reporting. Revenue is a tiered monthly subscription — Starter ($39, up to 10 properties), Professional ($120, up to 50), and Enterprise ($399, unlimited) — which makes Monthly Recurring Revenue (MRR), Annual Recurring Revenue (ARR), and net revenue retention the metrics that define company health.

As the founding operations hire, I am joining before any internal team or operational structure exists. Engineering is in place, a salesperson is onboard, and a customer service representative is being hired. There is currently no defined workflow for taking a new client account from sale to onboarded-and-healthy, no risk-flagging method, no support ticket system, and no revenue-retention motion. This plan closes those gaps.

The central thesis of this plan is proactive operations: build the systems that prevent fires before launch, rather than reacting to them after paying customers arrive. The deliverables below are sequenced into a 30/60/90-day roadmap so leadership can see exactly what gets built, when, and how success is measured.

## What This Plan Delivers

| Pillar | What Gets Built | Primary Outcome |
|---|---|---|
| Client Account Workflow | End-to-end flow from closed-won → onboarded → healthy account, with owned handoffs | No client falls through the cracks; predictable onboarding |
| Risk-Flag System | Health scoring, early-warning triggers, and escalation paths | Issues caught proactively, not after churn |
| Support Ticket Operation | Intake → triage → routing → resolution → QA loop with SLAs | Fast, measurable, consistent customer support |
| Revenue Retention Plan | Account management, book-of-business cadence, MRR/ARR tracking | Month-over-month revenue growth and retention |
| SOP & Hiring Standards | Documented procedures and onboarding for new hires/contractors | Scalable operations that don't depend on one person |

> **The One-Sentence Goal**
>
> Turn Equipped from a product with no operational backbone into a company where every client account is owned, every risk is flagged before it becomes churn, every support request is tracked to resolution, and every dollar of recurring revenue is actively defended and grown.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 2. Current-State Assessment

Before building, it is worth naming exactly where the company stands today. This is the baseline the 30/60/90 plan works against.

## Organizational Reality

| Function | Status Today | Operational Implication |
|---|---|---|
| Operations | First hire (me). No structure, no SOPs, no tooling decisions made. | Everything operational must be designed from zero — an opportunity to build it right. |
| Engineering | Onboard and building the product. | I am the bridge between customer-reported issues and the eng backlog — needs a bug/issue intake flow. |
| Sales | One person in seat. | I must define the sales → onboarding handoff so closed deals convert to active, paying, healthy accounts. |
| Customer Service | Being hired. | I will define the support flow and SOPs this rep operates inside, and likely onboard them. |
| Product Status | Pre-launch (apps listed but not live to paying clients). | Best possible time to install systems — no legacy chaos to unwind. |

## The Core Risks of Doing Nothing

- Reactive support: without a ticket system, customer issues arrive by scattered email/Slack/phone, get lost, and damage trust during the fragile launch window.
- Silent churn: with no account-health signal, the first sign a client is unhappy will be their cancellation — the most expensive way to learn it.
- Onboarding leakage: closed deals that never fully activate become “paying-but-not-using” accounts that churn within 1–2 billing cycles.
- Founder-dependency: if operational knowledge lives only in my head, the company cannot scale or survive my absence.

> **Why Now Is the Right Moment**
>
> Building these systems pre-launch is dramatically cheaper than retrofitting them after onboarding hundreds of accounts. The 90-day window aligns operations to be live and tested before the first wave of paying customers, so the company launches proactive instead of scrambling.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 3. The 30 / 60 / 90-Day Roadmap

The roadmap is organized into three phases. Each phase has a theme, milestone deliverables, and exit criteria — the conditions that must be true to consider the phase complete. This is the operational backbone of the plan; Sections 4–7 detail the systems referenced here.

| Phase | Theme | One-Line Mission |
|---|---|---|
| **Days 1–30** | Listen, Map & Stabilize | Understand the business, document current state, and stand up the highest-leverage systems. |
| **Days 31–60** | Build & Systematize | Construct the full client-account, risk, and support workflows; begin the retention motion. |
| **Days 61–90** | Scale, Test & Hand Off | Stress-test, finalize SOPs, train new hires, and produce repeatable operating standards. |

## Phase 1 — Days 1–30: Listen, Map & Stabilize

Goal: leave week four with a clear map of how the business actually works, the operational tooling chosen, and the two most urgent systems (support intake + new-client workflow v1) live.

### Milestones

| # | Milestone | Key Actions | Done When |
|---|---|---|---|
| 1 | Discovery & stakeholder alignment | 1:1s with founders, eng, sales; document product capabilities, pricing logic, and go-live timeline. | A one-page “how Equipped works” doc is validated by leadership. |
| 2 | Tooling stack decision | Evaluate Airtable/Notion/Slack/Google Workspace; select system of record for accounts, tickets, and SOPs. | Tool stack approved and base workspaces created. |
| 3 | Client lifecycle map (v1) | Map every stage a landlord passes through: lead → sold → onboarded → active → renewal. | Lifecycle diagram exists with owners per stage. |
| 4 | Support intake (v1) | Stand up a single intake channel + ticket template so no request is lost from day one. | Any inbound request can be logged and tracked. |
| 5 | Bug/issue → engineering loop | Define how operations reports platform issues to eng (severity, template, channel). | Eng agrees to the intake format and severity tiers. |

**Phase 1 Exit Criteria**



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

> ✓Tooling stack chosen and configured (account tracker, ticket system, SOP library).
> ✓Client lifecycle mapped end-to-end with a named owner for each stage.
> ✓Support intake live: a request can be logged, assigned, and tracked.
> ✓Engineering issue-reporting loop agreed and documented.
> ✓Baseline metric definitions drafted (MRR, ARR, churn, ticket SLA).



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

## Phase 2 — Days 31–60: Build & Systematize

Goal: turn the v1 maps into full operating systems. By day 60 the new-client workflow, risk-flag system, and support operation run end-to-end, and the account-management retention motion is defined.

### Milestones

| # | Milestone | Key Actions | Done When |
|---|---|---|---|
| 6 | New-client account workflow (full) | Build the complete sold→onboarded→active flow with checklists, owners, and SLAs (Section 4). | A new account can be run through the workflow start to finish. |
| 7 | Risk-flag & account-health system | Define health scoring, early-warning triggers, and escalation paths (Section 5). | Every account can be scored Green/Yellow/Red with defined actions. |
| 8 | Support ticket operation (full) | Build triage, routing, priority tiers, SLAs, QA loop, and reporting (Section 6). | Tickets flow intake→resolution→QA with measurable SLAs. |
| 9 | Revenue retention plan | Define account management, book-of-business cadence, QBR structure, MRR/ARR tracking (Section 7). | Retention dashboard live; cadence calendar published. |
| 10 | QA framework for the platform | Build recurring QA checklists for core flows (screening, rent, maintenance, reporting). | QA runs on a schedule with logged results feeding the eng loop. |

**Phase 2 Exit Criteria**

✓A new client can be onboarded entirely through the documented workflow.
✓Account-health scoring is live and every account has a Green/Yellow/Red status.
✓Support operation runs with triage, SLAs, and a QA loop — metrics are visible.
✓Revenue-retention dashboard tracks MRR, ARR, and churn; account cadence is scheduled.
✓Platform QA runs on a recurring schedule.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

## Phase 3 — Days 61–90: Scale, Test & Hand Off

Goal: prove the systems work under realistic load, finalize the SOP library, and make operations transferable — so the customer service rep and future hires can run inside the systems without me being the single point of knowledge.

### Milestones

| # | Milestone | Key Actions | Done When |
|---|---|---|---|
| 11 | End-to-end stress test | Run mock/early accounts through the full lifecycle; log every break point and fix it. | Systems survive a realistic run with issues logged and resolved. |
| 12 | SOP library complete | Finalize all SOPs (Section 8) into a single searchable library. | Every core process has a published, versioned SOP. |
| 13 | New-hire onboarding standard | Build the onboarding path + training for the CS rep and future contractors (Section 9). | A new hire can be productive following the onboarding doc alone. |
| 14 | Contractor/vendor management SOP | Standardize contractor onboarding, vetting, and vendor records. | Contractors can be onboarded against a documented standard. |
| 15 | Operations reporting cadence | Establish the weekly/monthly ops report and the first Quarterly Business Review template. | Leadership receives a recurring ops + revenue report. |

**Phase 3 Exit Criteria**

✓All systems tested end-to-end and hardened against real failure modes.
✓Complete, versioned SOP library published and accessible.
✓New-hire onboarding standard proven (CS rep onboarded against it).
✓Contractor/vendor management standardized.
✓Recurring ops + revenue reporting cadence live, including a QBR template.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 4. New Client Account Workflow

This is the spine of proactive operations: a defined path that every new landlord account travels, from the moment sales closes the deal to a fully onboarded, actively-using, healthy account. The purpose is to eliminate the gap where sold accounts quietly fail to activate.

## The Lifecycle Stages

| Stage | Trigger | Owner | Core Actions | Exit / Handoff |
|---|---|---|---|---|
| 1. Closed-Won → Handoff | Sales marks deal won | Sales → Ops | Capture account details, plan tier, property count, key contact, and expectations into the account record. | Complete account record created in system of record. |
| 2. Welcome & Kickoff | Handoff complete | Ops | Send welcome sequence; schedule kickoff; confirm goals and success criteria. | Kickoff held; success criteria documented. |
| 3. Onboarding & Setup | Kickoff done | Ops | Guide account/property setup, tenant import, payment connection, first maintenance config; run the onboarding checklist. | Account fully configured and first key action completed. |
| 4. Activation | Setup complete | Ops | Confirm the client has completed the core "first value" action (e.g. first rent collection scheduled, first tenant onboarded). | Activation milestone hit — account is genuinely live. |
| 5. Ongoing Account Mgmt | Activated | Ops / AM | Run health monitoring, periodic check-ins, book-of-business cadence (Section 7). | Account in steady state; health = Green. |
| 6. Renewal / Expansion | Approaching renewal | Ops / AM | Review usage, surface upsell (tier upgrade by property count), secure renewal. | Renewed and/or expanded; or churn-saved. |

> **Why "Activation" Is a Named Stage**
>
> The single biggest cause of early SaaS churn is paying-but-not-activated accounts. By making activation an explicit milestone with an owner, an account is never considered "successfully onboarded" until the client has experienced real value — which is the strongest predictor of retention.

## Onboarding Checklist (Stage 3 detail)

1. Account record verified (contact, plan tier, property count, billing active).



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

2. Properties registered in the platform.
3. Tenants onboarded / imported.
4. Rent collection configured and payment method connected.
5. Maintenance workflow and contractor preferences set.
6. Financial reporting reviewed with the client.
7. Client confirms they can independently perform the core daily tasks.
8. Activation milestone logged; account moved to Ongoing Account Management.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 5. Risk-Flag & Account-Health System

Proactive operations means an account never churns as a surprise. This system assigns every account a health status, defines the signals that move it, and prescribes the action each status triggers. It converts "gut feel" into a repeatable early-warning system.

## Account Health Status Model

| Status | Meaning | Typical Signals | Required Action |
|---|---|---|---|
| **GREEN** | Healthy & active | Regular logins/usage, payments on time, low ticket volume, onboarding completed. | Maintain normal cadence; look for expansion. |
| **YELLOW** | At risk / watch | Declining usage, repeated support issues, stalled onboarding, slow responses. | Proactive outreach within defined SLA; create a recovery plan. |
| **RED** | Critical / churn risk | No activity, failed payment, unresolved escalation, cancellation signal. | Immediate escalation; recovery/save play; leadership notified. |

## Early-Warning Triggers (Risk Flags)

These are the specific, monitorable conditions that automatically flag an account for review. Each should be tracked in the account system wherever data allows.

- Onboarding stalled — account not activated within the target window after closed-won.
- Usage drop — a meaningful decline in logins or core actions versus the account's own baseline.
- Payment failure — a failed or late subscription charge.
- Support friction — repeated tickets on the same issue, or any escalated/unresolved ticket past SLA.
- Sentiment signal — negative feedback, frustrated tone, or an explicit complaint.
- Silence — no response to outreach across a defined number of attempts.

## Escalation Path

| Level | When | Who Acts | Response Target |
|---|---|---|---|
| L1 — Monitor | Yellow flag raised | Ops / Account owner | Outreach + recovery plan within 2 business days. |
| L2 — Escalate | Red flag, or Yellow unresolved | Ops lead | Save play initiated; daily tracking until resolved. |
| L3 — Leadership | Churn imminent or high-value account at risk | Founders + Ops | Same-day review; retention decision |



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

| Level | When | Who Acts | Response Target |
|---|---|---|---|
| | | | (concession, fix, exec call). |

**Implementation Note**

At pre-launch, several of these signals can't be measured automatically yet. Phase 1 documents the signals; Phase 2 wires up whatever the platform and tooling can track today, with a manual review cadence covering the rest. The framework is designed to harden as product analytics mature.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 6. Support Ticket Operation

A single, tracked path for every customer request — from a landlord's payment question to a tenant's maintenance issue to a reported bug. This replaces scattered, lost, reactive support with a measurable operation the incoming CS rep can run inside.

## The Ticket Flow

| Step | What Happens | Owner |
|---|---|---|
| 1. Intake | All requests funnel into one channel and become a ticket with a unique ID, requester, category, and timestamp. | CS Rep / Ops |
| 2. Triage | Categorize (account, payment, maintenance, bug, how-to) and set priority tier. | CS Rep |
| 3. Route | Resolve directly, or route: bugs → engineering loop; account risk → risk-flag system; billing → finance. | CS Rep / Ops |
| 4. Resolve | Action the fix, communicate clearly to the requester, confirm resolution. | Owner of category |
| 5. Close & QA | Close ticket, log resolution, sample-check for quality and root-cause patterns. | Ops |
| 6. Feedback Loop | Recurring issues feed SOP updates, product/eng backlog, and risk flags. | Ops |

## Priority Tiers & Target SLAs

SLA targets below are recommended starting points to be confirmed with leadership; the point is that every ticket has a defined, measurable expectation.

| Priority | Definition | First Response | Resolution Target |
|---|---|---|---|
| P1 — Critical | Platform down, payment failure, security, or anything blocking money movement. | Within 1 hour | Same business day |
| P2 — High | Core feature broken for a client; maintenance emergency. | Within 4 hours | 1–2 business days |
| P3 — Normal | Standard question, non-blocking issue, how-to. | Within 1 business day | 2–3 business days |
| P4 — Low | Cosmetic, feature request, general feedback. | Within 2 business days | Backlog / scheduled |

## Bug / Engineering Hand-Off Template



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

When a ticket is a platform defect, operations passes it to engineering in a consistent format so eng can act without back-and-forth:

- Severity (P1–P4) and number of accounts affected.
- Steps to reproduce, expected vs. actual behavior.
- Screenshots/recording, affected account(s), and ticket ID for tracking.
- Customer impact statement (is money or trust at risk?).

## Support Metrics to Track

- **Volume:** tickets per day/week by category.
- **Responsiveness:** first-response time and resolution time vs. SLA.
- **Quality:** reopened-ticket rate and customer satisfaction on resolved tickets.
- **Patterns:** top recurring issues — the roadmap for SOP and product fixes.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 7. Revenue Retention & Growth Plan

Because Equipped earns tiered MRR, retention is the engine of the business: keeping and expanding existing accounts compounds far more cheaply than constantly replacing churned ones. This section defines the account-management motion, the book-of-business cadence, and the metrics leadership will watch.

## The Revenue Metrics That Matter

| Metric | What It Measures | Why Ops Owns It |
|---|---|---|
| **MRR** | Monthly Recurring Revenue — total predictable monthly subscription revenue. | Onboarding speed and activation directly drive how fast new MRR turns on. |
| **ARR** | Annual Recurring Revenue — MRR × 12; the headline growth number. | Retention determines how much MRR survives to become durable ARR. |
| **Gross Churn** | % of recurring revenue lost to cancellations/downgrades. | Risk-flag system exists specifically to drive this down. |
| **Net Revenue Retention** | Revenue from existing accounts incl. expansion, net of churn. | Account management + tier-upgrade motion pushes this above 100%. |
| **Expansion** | Revenue from upgrades (e.g. Starter→Professional as portfolios grow). | Health monitoring surfaces the right moment to upgrade. |

## Account Management Workflow

Every account, once activated, is actively managed rather than left alone until renewal. The cadence scales with account value:

| Segment | Definition | Touch Cadence | Focus |
|---|---|---|---|
| Enterprise / High-value | $399 tier, large portfolios | Monthly check-in + QBR | Deep relationship, strategic value, expansion |
| Professional / Mid | $120 tier, growing owners | Periodic check-in (e.g. ~6 wks) | Usage health, upgrade-readiness |
| Starter / Volume | $39 tier, smaller owners | Lightweight / triggered by health flags | Scaled outreach, automated nurture, self-serve |

## Book-of-Business Communication Plan



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

The "book of business" is the full set of accounts under management, organized so no relationship goes dark. The communication plan layers proactive, scheduled touches with reactive, trigger-based ones:

- **Scheduled touches —** onboarding check-ins, periodic health reviews, and renewal conversations, calendared by segment.
- **Trigger-based touches —** outreach fired automatically by a risk flag (usage drop, payment failure, support friction).
- **Value touches —** product tips, new-feature announcements, and reporting reviews that reinforce why the platform is worth paying for.
- **Renewal/expansion touches —** structured conversations ahead of renewal and at natural growth moments (e.g. client crossing a property-count threshold).

## Quarterly Business Review (QBR)

For higher-value accounts, a QBR is a recurring structured review that demonstrates value and secures the relationship. A repeatable QBR template includes:

9. Account health and usage summary since last review.
10. Value delivered — rent collected, maintenance resolved, time/cost saved, reporting insights.
11. Open issues and how they were handled.
12. Goals for the coming quarter and any expansion opportunities.
13. Renewal outlook and next steps.

## Account Health & Relationship Strategy

> **The Retention Operating Principle**
>
> Retention is engineered, not hoped for. Three systems in this plan combine into one retention engine: (1) the account-health model flags risk early, (2) the account-management cadence keeps every relationship warm, and (3) the QBR/expansion motion turns healthy accounts into growing ones. Together they target net revenue retention above 100% — meaning the existing customer base grows revenue even before a single new sale.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 8. Standard Operating Procedure (SOP) Library

SOPs convert the systems above into repeatable, teachable procedures so operations do not depend on any single person. Each SOP follows a consistent structure and lives in one searchable library.

## SOP Template (applied to every procedure)

| Field | Content |
|---|---|
| Title & ID | Clear name and version number. |
| Purpose | What the procedure achieves and why it matters. |
| Owner | Role responsible for the procedure and for keeping it current. |
| Trigger | What event starts the procedure. |
| Steps | Numbered, specific, do-able-by-a-new-hire actions. |
| Tools | Systems and templates used. |
| Definition of Done | The condition that marks the procedure complete. |
| Escalation | What to do when something goes wrong or is out of scope. |

## Priority SOPs to Build (mapped to the roadmap)

| SOP | Covers | Phase |
|---|---|---|
| New Client Onboarding | The full Section 4 workflow and checklist. | 2 |
| Sales → Ops Handoff | What sales captures and how it transfers to operations. | 2 |
| Support Ticket Handling | Intake, triage, routing, resolution, QA (Section 6). | 2 |
| Bug / Issue Reporting to Eng | Severity, template, and the engineering hand-off. | 1–2 |
| Account Health Review | How to score accounts and act on each status (Section 5). | 2 |
| Risk Escalation | The L1–L3 escalation path and save plays. | 2 |
| Maintenance Request Coordination | Tracking requests through to timely resolution. | 2 |
| Contractor / Vendor Onboarding | Vetting, onboarding, and record-keeping (Section 9). | 3 |
| Platform QA Checklist | Recurring checks on core flows. | 2–3 |
| Operations Reporting | Weekly/monthly report and QBR production. | 3 |
| New Employee/Contractor | Getting a new hire productive (Section 9). | 3 |



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

| SOP | Covers | Phase |
|---|---|---|
| Onboarding | | |



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 9. New-Hire & Contractor Standards

The final deliverable makes operations transferable. As the company grows from one operations person to a team, every new hire and contractor should be able to become productive by following a documented standard — not by absorbing knowledge informally.

## New-Hire Onboarding Path

A structured ramp that takes a new operations or support hire from day one to fully productive. The incoming customer service rep is the first test of this standard.

| Stage | Timeframe | Focus | Outcome |
|---|---|---|---|
| Orientation | Days 1–2 | Company, product, mission, tools access, who's who. | Set up and oriented. |
| System Training | Days 3–7 | Walk through the SOP library, ticket system, account workflow, risk model. | Understands the systems they'll operate in. |
| Shadowing | Week 2 | Observe live tickets, onboardings, and account reviews. | Sees the standards applied in practice. |
| Supervised Doing | Weeks 3–4 | Handle real work with review and feedback. | Performing core tasks with light oversight. |
| Independent | Week 4+ | Own their function against the SOPs and metrics. | Fully productive and accountable to standards. |

## Contractor / Vendor Management Standard

Because maintenance coordination relies on a contractor network, vendor onboarding needs its own standard:

14. Intake — capture contractor details, trade, service area, and credentials.
15. Vetting — verify licensing/insurance and references against a defined checklist.
16. Onboarding — set expectations on response time, communication, and the platform workflow.
17. Record — maintain a vendor directory with performance notes.
18. Review — periodically assess reliability and quality; flag underperformers.

## What “Good” Looks Like for the Operations Function

**Operating Standards — The Bar Every Hire Is Held To**

1. Nothing gets lost. Every request, account, and risk lives in a system, not someone's memory.
2. Proactive over reactive. We reach out before clients complain and flag risk before it becomes churn.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

3. Documented and repeatable. If you do it twice, it becomes an SOP.
4. Measured. Every process has a metric and an SLA.
5. Customer trust is the product. During launch especially, how we handle issues is the brand.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute

# 10. Success Metrics Dashboard

How leadership will judge whether this plan worked. These are the recommended KPIs the operations function reports against, grouped by what they protect.

## Operational KPIs

| Metric | Target Direction | Reported |
|---|---|---|
| Onboarding time (sold → activated) | Down | Weekly |
| Activation rate (sold accounts reaching first value) | Up | Weekly |
| Ticket first-response & resolution vs. SLA | Meet/beat SLA | Weekly |
| Ticket reopen rate | Down | Monthly |
| % of accounts with a current health score | 100% | Monthly |
| Open risk flags resolved within SLA | Up | Monthly |

## Revenue KPIs

| Metric | Target Direction | Reported |
|---|---|---|
| MRR | Up month-over-month | Monthly |
| ARR | Up | Monthly / Quarterly |
| Gross revenue churn | Down | Monthly |
| Net revenue retention | Above 100% | Quarterly |
| Expansion revenue (tier upgrades) | Up | Quarterly |

**Closing Note**

This plan is intentionally sequenced so the company reaches go-live with proactive operations already running rather than being built under fire. Sections 4–7 are the systems; Section 3 is the order they're built in; Sections 8–9 make them last beyond me. The first 30 days are the highest-leverage window — every system below traces back to a milestone I can begin on day one.



Confidential work sample | Jayson Forde | jaysonforde-portfolio.netlify.app | Do not distribute