

DEMONSTRATION SAMPLE

BUSINESS IDEA DEVELOPMENT

Business Launch Roadmap

Example: Juniper Lane Studio — fictional home organization service

01 • Define the offer

Organize homes and offices within a 20-mile service radius; launch with three packages.

02 • Identify the customer

Busy households, home-based professionals, and small office managers.

03 • Set up foundations

Select business structure with appropriate advisors; register, insure, price, and set boundaries.

04 • Prepare operations

Create intake form, job checklist, proposal, invoice, and client file structure.

05 • Launch readiness

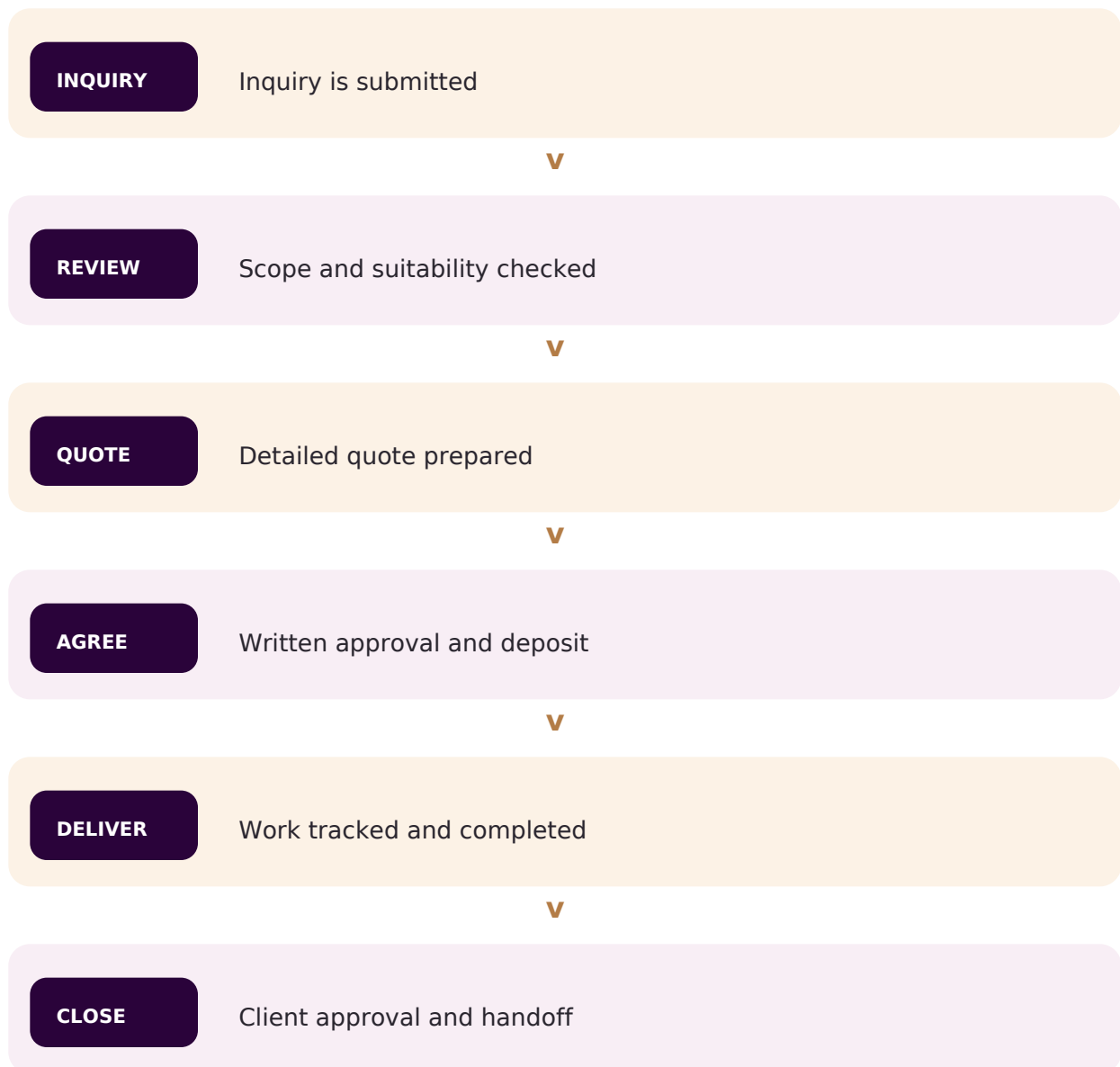
Publish a simple website, test inquiry process, and confirm service capacity.

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BUSINESS SYSTEMS

New Client Workflow Map

Example: standardized client intake-to-delivery process



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FORMS AND DOCUMENTATION

Client Intake Form

Example: an organized inquiry form for a small service business

CONTACT INFORMATION

Full name _____

Business name _____

Email _____

Preferred contact method _____

PROJECT DETAILS

Service requested _____

Project description _____

Main goal _____

Desired completion date _____

APPROVAL & NOTES

Estimated budget range _____

Anything we should know? _____

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VIRTUAL ADMINISTRATIVE SUPPORT

Operations Tracker

Example: weekly admin task tracking and deliverable control

TASK	OWNER	DUE	STATUS
Organize shared client files	Admin	Mon	Complete
Create updated intake form	Admin	Tue	Complete
Research 5 supplier options	Admin	Wed	In review
Reconcile invoice register	Owner	Thu	Open
Update weekly process log	Admin	Fri	Open
Prepare project summary	Admin	Fri	Open

WEEKLY HANDOFF

Completed items, outstanding blockers, and next steps are summarized in one clear client update.

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RESEARCH AND ANALYSIS

Decision Research Brief

Example: comparing appointment-free contact tools for a fictional studio

PROJECT QUESTION

Which simple customer inquiry process is the easiest to manage for a one-person business?

OPTION A • Contact form

Low maintenance; structured submissions; easy to track in a CRM. Requires email delivery testing.

OPTION B • Shared business inbox

Flexible and familiar; requires manual labeling and task assignment.

OPTION C • Task request portal

Centralized records and file uploads; greater setup and security requirements.

SAMPLE RECOMMENDATION

Start with a secure contact form connected to a client tracker. Add a portal after the workflow is established.

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PROCESS DOCUMENTATION

Standard Operating Procedure

Example: handling a new administrative support request

PURPOSE

Keep client work organized, secure, and on schedule.

STEP 1 • RECEIVE

Record the request, client, scope, date received, and relevant attachments.

STEP 2 • ASSESS

Confirm the request is within the agreed services; estimate effort and deadline.

STEP 3 • APPROVE

If outside scope, request written approval for any added charge before proceeding.

STEP 4 • COMPLETE

Do the work, check accuracy, and save deliverables to the correct client folder.

STEP 5 • CONFIRM

Send an update, record approval or revisions, and close the task.