

# Admin & Operations Stage

## Admin & Operations Stage

### Admin and Operations Stage ▲

Welcome to the Admin & Operations ...

Legal Setup

Banking & Finance

Budgeting & Planning

CRM & Customer Data

Project & Task Management

Document Management

Strategy & Planning

Compliance and Risk

Export Admin & Operations Results

The Admin and Operations Stage is the operational phase of the roadmap, broken down into eight distinct sequential sub-stages accessed via the left-hand sidebar dropdown:

**Sub-Stage 1: Welcome to the Admin & Operations Stage** This is the initial onboarding landing view that provides corporate setup context, introductory media, and operational overviews before legal structural work begins.

**Sub-Stage 2: Legal Setup** The second item listed within the administrative sequence, focusing on legal entity formats, registration requirements, and liability rules.

**Sub-Stage 3: Banking & Finance** The third item listed within the administrative sequence, tracking institutional business banking setups, EIN tax identity keys, accounting methods, and integrated financial management tools.

**Sub-Stage 4: CRM & Customer Data** The fourth item listed within the administrative sequence, managing client relationship platforms, tracking incoming lead sources, and setting operational follow-up cadences.

**Sub-Stage 5: Project & Task Management** The fifth item listed within the administrative sequence, evaluating project spaces, configuring workflow methodologies, and defining day-to-day task trackers.

**Sub-Stage 6: Document Management** The sixth item listed within the administrative sequence, establishing secure cloud storage solutions, folder hierarchy standards, and data access policies.

**Sub-Stage 7: Strategy and Planning** The seventh item listed within the administrative sequence, mapping short-term execution goals, long-term visions, and foundational organizational roadmap milestones.

**Sub-Stage 8: Compliance and Risk** The eighth item listed within the administrative sequence, addressing data privacy standards, liability insurance safeguards, operational risk audits, and mitigation strategies.

**Sub-Stage 9: Export Admin & Operations Results** The final technical milestone within this phase, concluding the operational documentation sequence before next stage parameters unlock.

**Stage Controls Next Button:** A blue Next → link utility centered at the bottom of the active frame allows the user to save current progress or cycle sequentially to the next sub-stage item.

## Stage Controls

- **Next Button:** A blue Next → link utility centered at the bottom of the active workspace layout card allows the user to log introductory configurations and cycle sequentially into the business layout configuration sub-stages.

## Sub-Stage 1: Welcome to the Admin & Operations Stage

## Welcome to the Admin & Operations Stage

Make sure you have your foundational systems, tools, and decisions in place to run your business smoothly and legally.



Next →

This sub-stage serves as the welcome landing screen for the administrative and operational setup phase. It establishes an overview of the core legal, financial, and procedural steps required to construct a firm corporate infrastructure.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Welcome to the Admin & Operations Stage".
- Instructional Subtitle: "Get an overview of the Admin & Operations process and learn how this stage will help you set up your business structure, legal requirements, and operational workflows."
- Operations Launch Media Panel: Features a full-width workspace graphic or video element set in an open modern office environment. The media layout showcases the clean title card text "Admin & Operations" on the upper-left section and incorporates the official buildrunkit logo badge on the upper-right corner.

## Navigation Controls

- Next Button: A solid blue Next → navigation action button is centered directly below the primary media display card to lock in the stage preview and proceed smoothly to Sub-

## Stage 2 (Legal Setup).

# Sub-Stage 2: Legal Setup

### Legal Setup

Set up your business legally: choose an entity type, complete registrations, and understand required documents.

#### Why is this step critical? The "Corporate Veil"

In the United States, forming a legal entity (like an LLC) creates a fictional "person" separate from you. This separation is your primary defense line, known as the Corporate Veil.

**The Risk:** If you mix personal and business finances (known as "commingling funds"), a court can decide to "pierce the corporate veil." This means you lose your liability protection, and your personal assets—like your home, car, or life savings—could be seized to pay for business lawsuits or debts.

**The Golden Rule:** Treat your business as a completely separate person. Never pay for personal groceries with the business card, and never pay business bills from your personal checking account.

### Choose Your Business Structure

#### Sole Proprietorship

The simplest form. You and the business are the same legal person.

#### Single-Member LLC

A separate legal entity owned by one person. Offers liability protection with simple taxation.

#### Multi-Member LLC

Same as a Single-Member LLC, but with two or more owners (partners).

#### C Corporation

An independent legal entity owned by shareholders.

#### S Corporation

A tax designation for Corps (or LLCs) that lets profits pass through to owners' personal returns avoiding double taxation.

#### Single-Member LLC Recommended

##### Overview

A separate legal entity owned by one person. Offers liability protection with simple taxation.

##### ✓ Pros

Protects personal assets. Pass-through taxation (profits reported on your personal return). Low administrative burden.

##### ✗ Cons

Self-employment taxes apply to all profits.

##### Ideal For

Solopreneurs, consultants, and most small businesses starting out.

### Business Formation

Please select the state where you want to form your business to generate a report about the necessary documents and requirements:

Select State:

Select a state 

[Get Business Formation Docs](#)

# Operating Agreement

Legal Document for Your Business Governance

## 📄 What Is An Operating Agreement?

An internal document that outlines how your LLC is run, who owns what, and how decisions are made. It is the "rulebook" of your company.

### Why It Matters:

Even if you are a Single-Member LLC, having this document proves to courts that your business is a separate entity, reinforcing your liability protection.

## 📄 What It Looks Like

Structure: It is a formal legal contract, usually 5-20 pages long.

### Key Sections:

Ownership %: Who owns how much of the company.

Capital Contributions: How much money each member put in initially.

Distributions: How and when profits (and losses) are shared.

Management: Is it managed by members or by a hired manager?

Dissolution: What happens if the business closes or a partner leaves?

## 🔗 Official Resources

### U.S. Small Business Administration (SBA)

Official federal guide on LLC Operating Agreements.

### SCORE (SBA Partner)

Non-profit network offering free templates and mentorship.

## 📌 Important Action Item

You generally do NOT file this with the state. You keep it in your internal business records.

This document serves as an informational guide.  
Consult with a legal professional for your specific situation.

Next →

This sub-stage workspace guides founders through selecting their legal business structure, registering their formal business entity name, and completing foundational regulatory checkboxes required to establish operations legally.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Legal Setup".
- Instructional Subtitle: "Choose your business structure, register your business name, and complete the necessary legal requirements to set up your entity."

## Legal Configuration Panels

The workspace organizes entity structure and registration across three specific modular cards:

- 1. Business Structure (Top Left):
  - Instructional Label: “Select your business structure entity option.”
  - Entity Options Grid: Features four interactive choice cards arranged in a 2x2 grid:
    - Sole Proprietorship
    - Partnership
    - Limited Liability Company (LLC)
    - C-Corporation
- 2. Business Registration Details (Top Right):
  - Instructional Label: “Define your business structure registration details.”
  - Registration Form Field: Contains a text entry block labeled Registered Business Name \* displaying the placeholder text: “Enter your registered business name”.
- 3. Legal Requirements (Bottom Left):
  - Instructional Label: “Select your business structure legal requirement details.”
  - Compliance Checklist: Provides five distinct interactive checkboxes to track mandatory legal milestones:
    - Register Business Name
    - Apply for EIN / Tax ID
    - Obtain Business Licenses
    - Open Business Bank Account
    - Register for State Taxes

## Navigation Controls

- Next Button: A blue Next → navigation action button is anchored at the bottom right-hand margin of the footer line. Clicking this locks in your legal setup entries and advances the workspace sequentially to Sub-Stage 3 (Banking & Finance).

## Sub-Stage 3: Banking & Finance

## Banking & Finance

Pick a business bank account, credit card, and bookkeeping tools to manage your finances professionally.

### Banking & Financial Foundation

Now that you have your Entity and EIN, you must open a dedicated Business Bank Account.

#### Why not just use my personal account?

Beyond the legal risk of "piercing the corporate veil," using a personal account makes tax season a nightmare. You want to be able to hand your accountant a clean statement that only contains business transactions.

#### Choosing a Bank in 2026:

You have two main paths:

##### Traditional Banks

(Chase, Wells Fargo, BofA) Great if you need to deposit physical cash or want a local branch relationship. They often have monthly fees unless you maintain a high balance.

##### Neobanks / Fintechs

(Mercury, Relay, Brex) Built for startups. Usually no fees, better software integrations, and fully online setup. However, they rarely accept cash deposits.

### Choose Your Banking Strategy

#### Neobank / Fintech

Mercury, Relay, Brex, Novo  
Tech startups, digital agencies, and e-commerce businesses.

#### Traditional Bank

Chase, Bank of America, Wells Fargo  
Local retail stores, restaurants, or businesses that handle cash.

#### Neobank / Fintech

##### ✓ Pros

- No monthly fees
- Great user interface & mobile apps
- Easy integration with modern tools (Stripe, Quickbooks)
- Fast online setup (no branch visit)

##### ✗ Cons

- Hard to deposit physical cash
- No physical branches for face-to-face service
- Fewer traditional lending products (like SBA loans)

### Choose Your Accounting Method

#### Cash Basis Accounting

You record income when the money hits your bank, and expenses when the money leaves your bank.  
Freelancers, consultants, and small service businesses with no inventory.

Low Complexity

#### Accrual Basis Accounting

You record income when you send the invoice (bill it), and expenses when you receive the bill, regardless of when the money actually moves.  
SaaS companies, e-commerce (inventory), and larger businesses.

High Complexity

## Choose Your Tools

### Accounting Software

#### QuickBooks Online

The most popular choice. Every accountant knows how to use it, but it can be expensive and complex.

Industry Standard

#### Wave

Great free option for very small businesses, though features are limited compared to QuickBooks.

Free / Simple

#### Xero

Strong competitor to QuickBooks with a cleaner interface.

User Friendly

### Invoicing Solution

#### Goldilocks Invoices

Ecosystem Choice

Integrated directly with your BuildRunKit ecosystem. Keeps your invoicing separate from your complex accounting software to keep books clean.  
Simplify your books by keeping invoicing separate.

#### Stripe Invoicing

#### Freshbooks

## Decision & Outcome

### Final Banking & Finance Strategy

Summarize your banking and finance decisions...

### Additional Notes (Optional)

Any additional context or qualifying notes...

Next →

This sub-stage workspace focuses on setting up your business's financial infrastructure, including managing institutional banking relationships, establishing tax identifiers, and selecting integrated software solutions for accounting and invoicing.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Banking & Finance".
- Instructional Subtitle: "Set up your financial infrastructure including business banking, employer identification numbers, and accounting frameworks."

## Financial Configuration Panels

The workspace organizes primary details across four modular selection and text entry cards:

- 1. Business Banking (Top Left):
  - Instructional Label: "Define your business structure banking option."
  - Banking Options Grid: Features four interactive choice cards for major commercial banking platforms arranged in a 2x2 grid:
    - Chase
    - Bank of America
    - Wells Fargo
    - Mercury
- 2. Identification Details (Top Right):
  - Instructional Label: "Define your business structure tax identity numbers."
  - Tax Identifier Form Field: Contains a text entry block labeled EIN / Tax ID Number \* displaying the placeholder text: "Enter your EIN / Tax ID number".

## Tools Suite Selection

- Section Title: "Choose Your Tools"
- 1. Accounting Software: Features three selectable configuration choices:
  - QuickBooks Online (Industry Standard): The most popular choice. Every accountant knows how to use it, but it can be expensive and complex.
  - Wave (Free / Simple): Great free option for very small businesses, though features are limited compared to QuickBooks.
  - Xero (User Friendly): Strong competitor to QuickBooks with a cleaner interface.
- 2. Invoicing Solution: Features three integrated billing choices:
  - Goldilocks Invoices (Ecosystem Choice): Integrated directly with your BuildRunKit ecosystem. Keeps your invoicing separate from your complex accounting software to keep books clean. Simplify your books by keeping invoicing separate.
  - Stripe Invoicing
  - Freshbooks

## Strategy & Summary Documentation

- 3. Decision & Outcome:

- Form Field: A large text block labeled Final Banking & Finance Strategy \* where the user outlines their selected operational path.
- Optional Field: A secondary text input labeled Additional Notes (Optional) for supplemental documentation.

## Navigation Controls

- Next Button: A blue Next → navigation action button is anchored at the bottom right-hand margin of the footer line. Clicking this saves your banking choices, accounting and invoicing configurations, and final text logs, advancing the user directly to Sub-Stage 4 (Budget & Planning).

# Sub-Stage 4: Budget & Planning

### Budgeting & Planning

Create a simple budget and runway plan to understand your costs and financial needs.

#### Budgeting: Planning for Profitability

A budget isn't just a constraint; it's your roadmap. We focus on three core pillars:

**Income**  
Revenue projections of your sales.

**Fixed Expenses**  
Costs that stay the same every month (e.g., rent, software subscriptions).

**Variable Expenses**  
Costs that change based on usage or activity (e.g., utilities, marketing, etc.).

**The Goal**  
To achieve "break-even," "turning" by tracking from your variable cost to income that covers the cost of your business's sustainability.

#### Pre-Budget Checklist

Complete these tasks before diving into numbers. This ensures your budget is based on research, not guesswork.

- Review previous year's profit and loss statement (if applicable) [Placeholder](#)
- Research industry standards for expenses [Placeholder](#)
- Estimate fixed costs (rent, insurance, subscriptions) [Placeholder](#)
- Estimate variable costs (marketing, utilities, supply) [Placeholder](#)
- Project conservative monthly revenue [Placeholder](#)
- Set aside funds for taxes and emergency buffer [Placeholder](#)
- Review and adjust budget monthly [Placeholder](#)

#### Interactive Budget Calculator

##### Income Projections

Money coming in.

Product/Service Sales

Other Income (Consulting, etc.)

**Total Income:** \$0

##### Fixed Expenses

Recurring costs that generally stay the same.

Rent / Workspace

Salaries & Wages

Business Insurance

Software & Subscriptions

Internet & Phone

**Total Fixed:** \$0

##### Variable Expenses

Costs that fluctuate monthly.

Marketing & Advertising

Utilities (Electricity, Water)

Travel & Meals

Office Supplies

Legal & Professional Fees

**Total Variable:** \$0

#### Budget Summary

Total Income: \$0

Total Expenses: \$0

**Net Income:** \$0

[Need to Adjust](#)

#### Budget Analysis & Decision

Budget Strategy & Analysis

Summarize your budget strategy, key insights, and planned adjustments...

Additional Notes (Optional)

Any additional context, assumptions, or plans for budget review...

This sub-stage workspace guides founders through projecting their startup's financial path, analyzing crucial operational costs, establishing runway metrics, and defining final strategic spending choices.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Budget & Planning".
- Instructional Subtitle: "Plan your business finances, project your startup cost, and estimate your runway."

# Financial Planning & Strategy Sections

The workspace relies on explicit text logs to document financial trajectories and notes:

- 1. Financial Planning & Strategy:
  - Instructional Label: “Define your business structure budget option.”
  - Form Field: A required text entry block labeled Final Budget & Planning Strategy \* displaying the placeholder text: “Enter your final budget & planning strategy”.
  - Optional Field: A large text container labeled Additional Notes (Optional) displaying the placeholder text: “Enter your additional notes”.

## Navigation Controls

- Next Button: A blue Next → navigation utility button is located at the lower right margin of the footer line. Clicking this locks in your budget plans and advances the workspace sequentially to Sub-Stage 5 (CRM & Customer Data).

# Sub-Stage 4: CRM & Customer Data

## CRM & Customer Data

Choose how you'll track leads, customers, and follow-ups to stay organized and consistent.

### CRM: The Heart of Your Business

**The "Rolodex" is Dead**  
You might be tempted to track your first customers in a spreadsheet or your phone contacts. Don't.

**Why you need a CRM (Customer Relationship Management):**

**Speed to Lead:** When a potential customer contacts you, speed is everything. A CRM organizes leads so you can reply instantly.

**Follow-up Discipline:** 80% of sales happen after the 5th follow-up. A spreadsheet won't remind you to call John Doe next Tuesday; a CRM will.

**Data Ownership:** If a salesperson leaves your company, do they take their contacts with them? Not if the data lives in your company CRM.

**The Strategy:**  
Centralize every interaction—emails, calls, meetings—in one place. If it's not in the CRM, it didn't happen.

### Select Your CRM Solution

**BUILDORUNKIT CHOICE**

#### Goldilocks CRM

The 'Just Right' Solution

Built specifically for the BuildRunKit ecosystem. Seamlessly integrates with your invoicing and project tools without the bloat of enterprise software.

- Native integration with your current setup
- Simple, clean interface for founders
- One login for everything

Included / Bundle Recommended

#### Pipedrive

Sales-Focused CRM

A visual sales pipeline tool loved by deal-makers.

- Excellent visual pipeline
- Strong mobile app
- Great for pure sales teams

Paid (\$15-30/mo)

#### Notion (Template)

The DIY Option

Flexible and customizable, but requires manual setup and maintenance.

- Infinite flexibility
- Good for documentation + data
- Likely free if you already use Notion

Free / Low cost

#### HubSpot

The Enterprise Giant

Powerful marketing and sales suite. Starts free, but gets expensive very quickly.

- Industry standard
- Huge marketing automation features

Freemium (Expensive upgrades)

### Define Your Data Strategy

Where will your leads primarily come from?

e.g., Website contact form, LinkedIn cold outreach, Referrals...

Knowing your source helps you decide what data fields you need to capture.

What key data must you capture for every lead?

<input type="checkbox"/> Name & Email	<input type="checkbox"/> Phone Number
<input type="checkbox"/> Company Name	<input type="checkbox"/> Job Title
<input type="checkbox"/> Estimated Budget	<input type="checkbox"/> Timeline / Urgency

Follow-up Cadence Strategy

Choose your follow-up approach... ▾

### Your CRM Strategy Summary

**Selected Solution:**

- Goldilocks CRM Included / Bundle

Built specifically for the BuildRunKit ecosystem. Seamlessly integrates with your invoicing and project tools without the bloat of enterprise software.

### Final Decision & Notes

Final Decision Summary

Summarize your CRM implementation plan and next steps...

Additional Notes

Any additional context, concerns, or implementation notes...

[Next →](#)

This sub-stage workspace helps founders choose how to track leads, customers, and follow-ups to keep their business organized and consistent.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "CRM & Customer Data".
- Instructional Subtitle: "Choose how you'll track leads, customers, and follow-ups to stay organized and consistent."

## CRM Selection Panels

The primary section allows founders to evaluate and select their CRM software:

- Section Title: "Select Your CRM Solution"
- CRM Options Grid: Features four interactive options with specific pricing and feature details:
  - Goldilocks CRM (The 'Just Right' Solution / BuildRunKit Choice / Recommended): Built specifically for the BuildRunKit ecosystem. Seamlessly integrates with your invoicing and project tools without the bloat of enterprise software.
    - Bullet features: Native integration with your current setup; Simple, clean interface for founders; One login for everything.
    - Tag: Included / Bundle.
  - Pipedrive (Sales-Focused CRM): A visual sales pipeline tool loved by deal-makers.
    - Bullet features: Excellent visual pipeline; Strong mobile app; Great for pure sales teams.
    - Tag: Paid (\$15-30/mo).

- Notion (Template) (The DIY Option): Flexible and customizable, but requires manual setup and maintenance.
  - Bullet features: Infinite flexibility; Good for documentation + data; Likely free if you already use Notion.
  - Tag: Free / Low cost.
- HubSpot (The Enterprise Giant): Powerful marketing and sales suite. Starts free, but gets expensive very quickly.
  - Bullet features: Industry standard; Huge marketing automation features.
  - Tag: Freemium (Expensive upgrades).

## Data Strategy Parameters

- Section Title: "Define Your Data Strategy"
- Lead Source Input: An open text field labeled "Where will your leads primarily come from?" with placeholder text "e.g., Website contact form, LinkedIn cold outreach, Referrals..."
- Key Data Checkboxes: A multi-select area asking "What key data must you capture for every lead?" containing options for:
  - Name & Email
  - Company Name
  - Estimated Budget
  - Phone Number
  - Job Title
  - Timeline / Urgency
- Follow-up Cadence: A dropdown menu component labeled Follow-up Cadence Strategy with the placeholder text "Choose your follow-up approach..."

## Strategy Summary & Notes

- Section Title: "Your CRM Strategy Summary"
- Selected Solution Display: Dynamically shows the chosen platform based on the user's selection (e.g., Goldilocks CRM—Included / Bundle) along with its brief operational description.
- Final Decision Summary: A structured input block titled Final Decision Summary with the placeholder "Summarize your CRM implementation plan and next steps..."
- Additional Notes: A secondary text container labeled Additional Notes with the placeholder "Any additional context, concerns, or implementation notes..."

## Navigation Controls

- Next Button: A blue Next → action utility button is anchored in the bottom right-hand margin of the page footer. Clicking this locks in your CRM strategy records and advances the workflow sequentially to Project & Task Management.

## Sub-Stage 5: Project & Task Management

# Project & Task Management

Set up a system to track projects, assign tasks, and manage internal work.

## Project Management: Who is doing what?

### From Chaos to Clarity

It is easy to "keep it all in your head" when you are solo. But as soon as you add a co-founder, a freelancer, or just a second major project, things get messy.

### The Problem with "Chat Management":

Asking "Hey, did you finish that design?" in Slack or WhatsApp is not project management. It creates anxiety and things slip through the cracks.

### The Solution: A Single Source of Truth

You need a dedicated place where every task lives:

**Visibility:** Everyone knows what needs to be done without asking.

**Accountability:** Every task has one (and only one) owner.

**Peace of Mind:** If it's written down, you don't have to stress about remembering it.

## Select Your Project Management Tool

BUILDRUNKIT CHOICE

### Goldilocks Projects

Simple Project Tracking

The native project tool for BuildRunKit. It connects your tasks directly to your clients and invoices, keeping everything in one ecosystem.

Native integration with Goldilocks CRM & Invoices

Perfect for small teams who don't need enterprise complexity

No context switching between apps

Included

Recommended

### Trello

Visual Kanban Boards

The classic 'sticky notes on a digital wall' approach. Great for simple, visual workflows.

Extremely easy to learn

Great for linear processes (To Do → Doing → Done)

Freemium

### Asana

Structured & Powerful

A robust tool that handles lists, timelines, and boards well. Good for growing teams.

Flexible views (List, Board, Calendar)

Good for recurring tasks

Paid (Expensive for small teams)

### ClickUp

One App to Replace Them All

Feature-packed and highly customizable, but can be overwhelming (steep learning curve).

Does literally everything

Highly customizable

Freemium / Paid

### Perfect Integration!

Great choice! Since you selected Goldilocks CRM in the previous step, your client data will automatically appear in your Projects. No more switching between apps or duplicating client information.

### Define Your Workflow

How do you prefer to view your work?

**Kanban Board**  
Columns like 'To Do', 'In Progress', 'Done'. Visual and simple.

**Task Lists**  
Checklists with due dates. Good for detail-oriented people.

**Sprints / Cycles**  
We plan work in 1-2 week chunks. (Advanced).

Who is responsible for what? (High Level)

Name	Responsibility / Task

When do you review progress?

Choose your review cadence...

### Your Project Management Setup

**Selected Tool:**

- Goldilocks Projects** Included

The native project tool for BuildRunKit. It connects your tasks directly to your clients and invoices, keeping everything in one ecosystem.

### Final Decision & Notes

Final Project Management Strategy

Summarize your project management approach and implementation plan...

Additional Notes

Any additional context, team considerations, or implementation notes...

[Next →](#)

This sub-stage workspace guides founders through evaluating, choosing, and establishing their workflow tracking systems to keep daily operational tasks and milestone delivery structured.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Project & Task Management".
- Instructional Subtitle: "Choose how you'll manage your tasks, projects, and team workflows to stay execution-focused."

## Platform Selection Panels

The workspace provides an options matrix for evaluating project management tools:

- Section Title: "Select Your Project Management Tool"
- Tool Options Grid: Features four interactive choices with explicit ecosystem relevance and operational characteristics:

- Goldilocks Projects (The 'Just Right' Workspace / BuildRunKit Choice / Recommended): Built directly into your BuildRunKit ecosystem. Connect tasks directly to your CRM leads and client invoices without jumping between open tabs.
  - Bullet features: Native ecosystem integration; Zero configuration required; Task-to-invoice tracking.
  - Tag: Included / Bundle.
- Trello (Simple Kanban Boards): A visual card-based system great for simple linear workflows.
  - Bullet features: Extremely easy to learn; Great visual card layout; Free tier covers basics.
  - Tag: Freemium.
- Asana (Team & Timeline Focused): Structured project maps with list, board, and timeline views.
  - Bullet features: Powerful subtask management; Built-in team workloads; Great for collaboration.
  - Tag: Paid (\$10-25/mo).
- ClickUp (The Everything App): Highly customizable with massive features, though learning curves are steep.
  - Bullet features: Dozens of custom view types; Built-in docs and goals; Highly customizable dashboards.
  - Tag: Freemium (Feature complex).

## Workflow Parameters

- Section Title: "Define Your Internal Workflow"
- Methodology Dropdown: A selector field labeled Primary Methodology with the placeholder text "Choose your methodology approach..."
- Task Management Checkboxes: A multi-select area asking "What project elements will you track here?" featuring the options:
  - Internal Tasks
  - Client Deliverables
  - Product Roadmap
  - Content Calendar
  - Bug / Issue Tracking
  - Team Availability
- Meeting Cadence Input: An open text entry field labeled "What is your team meeting / review cadence?" containing the placeholder text "e.g., Daily standup, Weekly sprint planning, Bi-weekly retrospectives..."

## Strategy Summary & Notes

- Section Title: "Your Workspace Strategy Summary"
- Selected Solution Display: Dynamically displays the user's active choice (e.g., Goldilocks Projects—Included / Bundle) alongside its operational summary text.
- Final Decision Summary: A required, structured text block labeled Final Decision Summary \* with the placeholder "Summarize your task management implementation plan and

sprint setup...”

- Additional Notes: An open text block labeled Additional Notes (Optional) with the placeholder “Any additional workflow context, custom statuses, or onboarding steps...”

## Navigation Controls

- Next Button: A blue Next → navigation action button is anchored at the bottom right-hand margin of the footer line. Clicking this logs your project management choices and advances the workspace sequentially to Sub-Stage 6: Document Management.

# Sub-Stage 6: Document Management

## Document Management

Decide where and how you'll store important business files and organize your folders.

### Build Your "Data Room" Now

**The "Data Room" Mindset**  
It is easy to scatter files across your desktop, email attachments, and random Slack messages. But eventually, you will need to find a tax document from three years ago or show a contract to an investor.

**The Goal: A Single Source of Truth**  
Every important document—legal, financial, or creative—must live in a shared cloud drive, not on a personal laptop.

**Why structure matters:**  
**Onboarding:** New employees can find what they need without asking you 10 times a day.  
**Due Diligence:** If you ever raise money or sell the business, investors will ask for access to a "Data Room." If your folders are already organized, you look professional and prepared.  
**Disaster Recovery:** If your laptop breaks today, your business shouldn't stop.

### Select Your Storage Provider

- Google Drive / Workspace**   
The default choice for most startups using Gmail. Excellent collaboration on documents.  
**Pros:** Real-time collaboration (Docs/Sheets), Included with email, Easy permissions management  
**Cons:** Can get messy if people create files in their 'My Drive' instead of 'Shared Drives'  
**Recommended**
- Dropbox**   
Reliable, fast file syncing. Better for heavy files (video, design assets) than Google.  
**Pros:** Best-in-class sync speed, Very clean interface, Great for large files  
**Cons:** Editing documents isn't as seamless as Google Docs, Can get expensive for teams
- Nextcloud**   
The open-source, privacy-focused alternative. You can host it yourself or use a provider.  
**Pros:** Total data sovereignty (you own your data), Highly customizable, Privacy-focused  
**Cons:** Requires more technical setup/maintenance than the big players
- Microsoft OneDrive**   
Best if you are already deep in the Microsoft (Office 365) ecosystem.  
**Pros:** Deep integration with Word/Excel desktop apps, Good for Microsoft-heavy workflows  
**Cons:** Web interface can feel clunky compared to Google

## Recommended Folder Structure

### Company\_Name\_Root

 Copy Structure

#### 01\_Legal

-  Formation\_Documents (Articles of Inc, EIN)
-  Contracts\_Agreements
-  Intellectual\_Property (Trademarks, Patents)
-  Compliance\_Licenses





#### 02\_Finance

-  Bank\_Statements
-  Taxes\_Filings
-  Invoices\_Receipts
-  Payroll

#### 03\_Product

-  Roadmap\_Strategy
-  Designs\_UX\_UI
-  Technical\_Specs
-  User\_Research




#### 04\_Marketing\_Sales

-  Brand\_Assets (Logos, Fonts)
-  Marketing\_Materials
-  Sales\_Decks
-  Blog\_Content

#### 05\_HR\_Team

-  Employee\_Contracts
-  Onboarding\_Guides
-  Policies\_Handbook

#### 06\_Board\_Investors

-  Pitch\_Decks
-  Investor\_Updates
-  Cap\_Table

### Your Document Management Setup

**Selected Storage Provider:**

Google Drive / Workspace Recommended

The default choice for most startups using Gmail. Excellent collaboration on documents.

### Final Decision & Notes

Final Document Management Strategy

Summarize your document management approach and implementation plan...

Additional Notes

Any additional context, migration plans, or organizational notes...

[Next →](#)

This sub-stage workspace guides founders through setting up their company's document storage system, choosing file organization frameworks, and implementing basic data security protocols to keep critical business data secure and accessible.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Document Management".
- Instructional Subtitle: "Choose where you'll store files, how you'll organize them, and how you'll keep your business data safe."

## Platform Selection Panels

The workspace provides an options matrix for evaluating cloud storage solutions:

- Section Title: "Select Your Document Storage Solution"
- Storage Options Grid: Features four interactive choices with explicit ecosystem relevance and operational characteristics:
  - Goldilocks Drive (Ecosystem Integration / BuildRunKit Choice / Recommended): Secure storage built directly into your dashboard. Best for linking contract PDFs and operational assets directly to your client profiles.

- Bullet features: Native ecosystem file linking; Zero external accounts needed; Automatic client folder creation.
- Tag: Included / Bundle.
- Google Drive (Collaboration Focused): Excellent real-time editing and collaboration through Google Workspace docs.
  - Bullet features: Best-in-class live document editing; Powerful internal search tools; Ubiquitous platform familiarity.
  - Tag: Free / Part of Workspace.
- Microsoft OneDrive (Enterprise Integration): Deep integration with desktop Office applications and corporate Windows setups.
  - Bullet features: Perfect sync with desktop Word/Excel; Strong enterprise security controls; Part of Microsoft 365.
  - Tag: Free / Part of M365.
- Dropbox (Pure Storage & Sync): Reliable file synchronization engine with advanced shared folder link features.
  - Bullet features: Fast, bulletproof file syncing; Advanced link sharing permissions; Great standalone storage tool.
  - Tag: Freemium (\$10-20/mo).

## Security & Folder Strategy Parameters

- Section Title: "Define Your File Strategy"
- Folder Structure Dropdown: A selector field labeled Folder Structure Framework with the placeholder text "Choose your organization approach..."
- Security & Access Checkboxes: A multi-select area asking "What security practices will you implement?" featuring the options:
  - Enforce 2FA on Storage Accounts
  - Restricted Client Data Access
  - Regular Backup Cadence
  - Standardized File Naming Rules
  - NDA Requirements for Team Share
- Retention Policy Input: An open text entry field labeled "What is your document retention / archive policy?" containing the placeholder text "e.g., Keep financial records for 7 years, Archive inactive client folders after 12 months..."

## Strategy Summary & Notes

- Section Title: "Your Storage Strategy Summary"
- Selected Solution Display: Dynamically displays the user's active choice (e.g., Goldilocks Drive—Included / Bundle) alongside its operational summary text.
- Final Decision Summary: A required, structured text block labeled Final Decision Summary \* with the placeholder "Summarize your document management implementation plan, naming conventions, and security rules..."
- Additional Notes: An open text block labeled Additional Notes (Optional) with the placeholder "Any additional storage context, third-party backup tools, or onboarding notes..."

# Navigation Controls

- Next Button: A blue Next → navigation action button is anchored at the bottom right-hand margin of the footer line. Clicking this logs your document storage configurations and advances the workspace sequentially to Sub-Stage 7: Strategy and Planning.

## Sub-Stage 7: Strategy and Planning

### Strategy & Planning

Pick a place to keep your goals, roadmap, and priorities aligned and visible.

#### 📍 Strategy & Planning: Your North Star

It is easy to be busy. It is hard to be effective.

**The Trap:** Most founders spend 100% of their time working *IN* the business - answering emails, fixing bugs, and putting out fires.

**The Solution: Work ON the Business**

You need a dedicated place to work **ON** the business. This is your "Strategy Hub." It is where you keep:

**Roadmap:** What are we building in Q1, Q2, and Q3?

**OKRs:** Objectives and Key Results (How do we measure success?).

**Vision:** Why does this company exist?

**⚠️ The Rule**

Don't mix your high-level roadmap with your daily bug tracker. Keep your vision clear and uncluttered.

#### 🔗 Choose Your Strategy Tool

##### Strategy Hub Native Recommended

*Your Strategic Command Center*

**Included**

The native strategic planning tool for BuildRunKit. Connects your high-level goals directly to the projects executing them.

**Pros:**

- Keeps strategy visible (doesn't get buried in docs)
- Native integration with BuildRunKit projects and tasks
- One account for everything

##### Notion ○

*Flexible Wiki*

Great for writing long-form strategy documents and linking them to databases.

**Pros:** Highly visual, infinite flexibility

**Cons:** Requires setup time to build a good dashboard

##### Google Sheets / Excel ○

*The Classic Grid*

Good for financial modeling and simple timeline rows.

**Pros:** Everyone knows how to use it

**Cons:** Hard to visualize complex roadmaps  
Terrible on mobile

## Build Your Mini-Strategy

### The North Star (1-Year Goal)

If you could only achieve ONE thing in the next 12 months, what would it be?

e.g., Reach \$10k MRR and launch the mobile app.

### Current Quarter Focus (The 'Now')

e.g., Validate the MVP with 10 beta users.

### Top 3 Priorities for this Month

Priority 1

Priority 2

Priority 3

## Your Strategy & Planning Setup

### Selected Strategy Tool:

Strategy Hub Recommended Native

The native strategic planning tool for BuildRunKit. Connects your high-level goals directly to the projects executing them.

North Star Defined

Current Focus Set

## Final Decision & Notes

### Final Strategy & Planning Approach

Summarize your strategic planning approach and tool selection...

### Additional Notes

Any additional strategic insights, roadmap details, or implementation notes...

Next →

This sub-stage workspace serves as the master planning canvas where founders define their high-level business strategy, align on execution milestones, and establish clear operational frameworks to steer long-term growth.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Strategy and Planning".
- Instructional Subtitle: "Define your high-level business strategy, execution roadmap, and long-term planning frameworks."

## Operational Roadmap Panels

The layout organizes strategic alignment across three major structured sections:

1. Define Strategy Framework (Top Left):

- Instructional Label: “Define your business structure strategy option.”
- Strategic Focus Area Dropdown: A structural selection menu labeled Strategic Focus Area with the active placeholder text: “Choose your strategic focus approach...”
- Execution Framework Checkboxes: A multi-select area asking “What execution elements will you prioritize?” containing five key organizational options:
  - Milestone Tracking
  - Resource Allocation
  - Risk Mitigation
  - Growth Metrics
  - Timeline Alignment
- 2. Core Business Strategy Logs (Top Right):
  - Instructional Label: “Outline your main strategy goals and operational roadmap milestones.”
  - Strategy Plan Inputs: Provides two large, structured text entry forms:
    - Short-Term Goals (Next 90 Days) \*: A mandatory field with the placeholder text: “Enter your short-term operational goals...”
    - Long-Term Vision (1-3 Years) \*: A mandatory field with the placeholder text: “Enter your long-term business vision...”
- 3. Strategy Summary & Documentation (Lower Section):
  - Section Title: "Your Strategy Summary"
  - Strategic Path Detail Block: A wide input block labeled Final Strategy & Planning Strategy \* displaying the placeholder text: “Enter your final strategy & planning strategy”.
  - Supplemental Context Block: A large text container labeled Additional Notes (Optional) displaying the placeholder text: “Enter your additional notes”.

## Navigation Controls

- Next Button: A blue Next → navigation action link utility is anchored at the bottom right-hand margin of the footer line. Clicking this logs all execution parameters, goal texts, and strategy notes, advancing the user directly to Sub-Stage 8: Compliance & Risk.

## Sub-Stage 8: Compliance & Risk

## Compliance and Risk

Identify basic risks—insurance, contracts, policies—and ensure you're covering key compliance needs.

### Compliance & Risk: Protect Your Hard Work

In business, you don't get what you deserve; you get what you negotiate (and document).

**The Reality of Business in the US:** It is a litigious environment. A simple misunderstanding with a client or an accidental data leak can threaten your entire company if you aren't protected.

#### Two Shields of Defense:

**Insurance:** Transfers the financial risk to someone else. It is surprisingly affordable for small businesses.

**Contracts:** Prevent disputes before they happen by setting clear expectations in writing.

#### ⚠ The Rule

**Never start work without a signed contract. Never operate without basic liability coverage.**

*"The goal is to sleep well at night, knowing your business is protected."*

### Business Protection Score

0%

#### Vulnerable

High risk - protection needed

### Insurance Coverage (The Safety Net)

#### General Liability Insurance (GL)

Recommended

The baseline. Covers physical accidents (slip and fall) and basic property damage.

\$30-\$50/mo

#### Professional Liability (Errors & Omissions)

Recommended

Crucial for service businesses/SaaS. Protects you if a client claims your work caused them a financial loss or was negligent.

\$40-\$70/mo

#### Workers' Compensation

Required

Mandatory in almost every state as soon as you hire your first W-2 employee. Covers medical costs if an employee gets hurt.

Varies by state/payroll

*If you have employees*

#### Cyber Liability Insurance

For SaaS/Tech

Protects you against data breaches and hacking incidents. Vital if you store sensitive customer data.

\$50+/mo

### Legal Documents (The Paper Trail)

**Master Services Agreement (MSA)** Not Started

The contract you sign with clients. Defines scope, payment terms, and intellectual property ownership.

**Privacy Policy & Terms of Service** Not Started

Required by law (like GDPR or CCPA) if you have a website that collects data (analytics, forms, cookies).

**Non-Disclosure Agreement (NDA)** Not Started

Protects your secrets when talking to potential partners, employees, or investors.

### Final Decision & Notes

**Final Compliance & Risk Management Strategy**

Summarize your risk management approach, insurance decisions, and legal document priorities...

**Additional Notes**

Any additional risk considerations, implementation timelines, or regulatory notes...

[Next →](#)

This sub-stage workspace provides founders with a structured environment to evaluate organizational exposure, establish clear compliance policies, check off liability safeguards, and document their overall risk mitigation strategy.

## Canvas Layout & Workspace Components

- Main Workspace Title: Displays "Compliance & Risk".
- Instructional Subtitle: "Identify potential risks, establish compliance protocols, and ensure your business is protected against legal and operational vulnerabilities."

## Risk Mitigation & Policy Panels

The workspace divides regulatory safety and policy formulation into three targeted modular layout cards:

- 1. Define Compliance Framework (Top Left):
  - Instructional Label: “Define your business structure compliance option.”
  - Risk Level Dropdown: A menu component labeled Risk Level Assessment displaying the active placeholder text: “Choose your risk level approach...”
  - Mitigation Checkboxes: A multi-select area asking “What compliance protocols will you implement?” containing five operational options:
    - Data Privacy Compliance (GDPR/CCPA)
    - Workplace Safety Policies
    - Intellectual Property Protection
    - Regular Audits Cadence
    - Liability Insurance Coverage
- 2. Core Compliance Strategy Logs (Top Right):
  - Instructional Label: “Outline your main compliance goals and risk mitigation milestones.”
  - Compliance Inputs: Provides two large text entry blocks for descriptive documentation:
    - Key Operational Risks \*: A mandatory field with the placeholder text: “Enter your key operational risks...”
    - Mitigation Plan \*: A mandatory field with the placeholder text: “Enter your risk mitigation plan...”
- 3. Compliance Summary & Documentation (Lower Section):
  - Section Title: "Your Compliance Summary"
  - Final Strategy Detail Block: A wide input area labeled Final Compliance & Risk Strategy \* displaying the placeholder text: “Enter your final compliance & risk strategy”.
  - Supplemental Context Block: A large text container labeled Additional Notes (Optional) displaying the placeholder text: “Enter your additional notes”.

## Navigation Controls

- Next Button: A blue Next → navigation action utility link is anchored at the bottom right-hand margin of the page footer. Clicking this logs your compliance selections, liability fields, and strategic notes, advancing the workspace sequentially to Sub-Stage 9: Export Admin & Operations Results.

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