

# The Operator OS Manual

The starter system that ties your tools, follow-up, and content into one machine.

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Most operators have the pieces (a CRM, some content, a follow-up habit) but the pieces do not talk to each other. The Operator OS connects four parts so the whole thing runs as one machine instead of a pile of tabs.

## | THE FOUR PARTS

### 1. Capture

One place every lead lands, no matter where they came from (site, DM, referral, ad). If leads live in five inboxes, you will drop them. One front door, one list.

### 2. Follow-up

A set sequence that runs the moment a lead lands, so nobody falls through the gap between "reached out" and silence. The follow-up should start without you having to remember.

### 3. Content

A steady stream that keeps you visible and warms leads before they ever talk to you. It feeds the top of the machine so the follow-up always has someone to work.

### 4. The record (CRM)

One contact record per person that thickens over time: how they found you, what they opened, what they said. Everything else reads from and writes to this.

## | HOW THEY CONNECT

Capture writes to the record. The record triggers follow-up. Content refills capture. The record tells you who is worth a personal reach. It is a loop, not a line: each part feeds the next, so work never sits in a queue waiting on you.

## WHAT TO AUTOMATE FIRST

**Automate the hand-offs, not the relationship.** In order:

- **First:** the instant a lead is captured, they get one immediate response and enter the follow-up. This one automation saves the most leads.
- **Second:** tag and stage every contact automatically, so you can always see who is new, warm, or gone quiet.
- **Third:** the routine reminders and status updates that eat your day.

Keep human: the actual conversations, the judgment calls, the personal reach when the record says someone is ready.

## THE DAILY CADENCE

- Morning: check what the machine surfaced overnight (new leads, replies, who went quiet).
- Midday: the personal reaches the system flagged as worth your time.
- End of day: feed content in for tomorrow. That is the whole job once the machine runs.

When it is wired right, the system keeps shipping while you are offline, and your day shrinks to judgment and relationships, which is the part only you can do.

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