

Growth Operations Manual.

The message. The infrastructure.
The way it runs.

SAMPLE HANDOVER · VERSION 1.0

This is an illustrative handover for an established owner-led business. It shows the level of practical documentation we would tailor to a client's agreed scope. It is not a completed client implementation.

How to use this manual

Begin with the message. Use the infrastructure register to find each system, then follow the operating routines. Replace every bracketed field with your agreed business details before using it as an operating document.

Inside: message & brand · infrastructure register · enquiry workflow · content & campaigns · CRM & reporting · ownership & handover

Start with the message.

Every customer touchpoint should explain the same value, in language the customer understands.

Positioning worksheet

Audience: [primary customer and decision-maker].

Problem: [what they need to resolve].

Offer: [what you do and the result it supports].

Difference: [why your approach is credible and useful].

Proof: [approved evidence, with source and permission].

Example message — illustrative

“Dependable technical support for businesses that cannot afford unnecessary downtime.”

This is sample wording for a technical services business, not an approved client claim.

Replace it after the positioning workshop.

The message in practice

Website: explain who you help, the problem you solve, the offer and the next step.

Campaign: focus on one customer problem, one relevant offer and one action.

Sales conversation: confirm the customer’s situation before explaining the solution.

Proposal: connect the agreed scope to the customer’s priorities.

Brand and writing rules

Use clear, concrete language. Avoid claims such as “best” or “guaranteed” without evidence. Keep names, service descriptions and contact details consistent. Use the approved logo files, colour values and typography from [brand folder]. Do not stretch the logo or rebuild it from a screenshot.

Approval	Record before publishing
Message owner	[name / role] approves changes to positioning and core claims.
Asset location	[shared drive link] contains master files and approved templates.
Change log	Record date, editor, reason, approval and affected channels.

Know what has been built.

A connected setup needs a clear inventory. Each item below receives an owner, a location and a check before handover.

Infrastructure	Handover evidence
01 Strategy & messaging	Positioning, priority audiences, value proposition and approved message.
02 Brand identity	Master identity files, brand rules and reusable templates.
03 Website & conversion	Website, landing pages, forms and enquiry confirmation paths.
04 Search presence	Search indexing, on-page foundations and relevant listing records.
05 Publishing platform	Article templates, categories and publishing workflow.
06 Social & content	Channel access, themes, calendar and content templates.
07 Paid acquisition	Agreed campaign accounts, audiences, creative and page connections.
08 CRM & sales	Contact fields, pipeline, routing, owners and follow-up tasks.
09 Email & nurture	Permission records, segments, templates and agreed sequences.
10 Integrations	Form-to-CRM connections, automation rules and failure alerts.
11 Sales collateral	Capability document, proposal templates and approved sales assets.
12 Proof & reputation	Approved testimonials, case-study files and collection process.
13 Measurement	Tracking, reporting views, definitions and review routine.

For every item, record: [business owner] · [system / folder URL] · [administrator] · [last verified date] · [status / open issue]. Actual deliverables depend on the signed scope.

Make every enquiry visible.

A useful enquiry should reach a responsible person and have a recorded next step.

Step	Action	Evidence
Receive	Form creates a CRM record and sends the agreed notification.	Source, timestamp and contact details recorded.
Assign	Sales lead assigns one owner and checks for duplicates.	Named owner and next-action date.
Respond	Owner reviews context and sends a relevant reply.	Contact attempt logged.
Qualify	Confirm need, fit, decision process and timing.	Notes and appropriate pipeline stage.
Progress	Book a conversation, issue a proposal or close with a reason.	Next task or recorded closure reason.

Suggested operating standard — agree with the client

Review new enquiries each business day. Aim to make the first human response within one business day. If the owner is absent, [backup owner] takes the queue. This is a sample service standard, not a delivery promise.

If a form or notification fails

Submit a test enquiry using a clearly marked test contact. Check the form confirmation, CRM record and notification separately. If a step fails, contact [support owner], log the issue and use the agreed backup contact route. Reconcile any enquiries received during the outage before closing the incident.

Daily check

Review unassigned enquiries, overdue tasks and duplicates. Confirm each open opportunity has one owner and a dated next step. Close test records only after recording the test result.

Run a repeatable publishing rhythm.

The message stays consistent. The examples, formats and distribution adapt to the audience.

Cadence	Routine	Owner
Weekly	Review questions from sales. Select useful topics. Draft, approve and schedule the agreed content.	[content lead]
Before publication	Check accuracy, permission, links, image rights, contact details and the next action.	[approver]
Before a campaign	Confirm objective, audience, budget cap, destination, tracking and enquiry owner.	[campaign lead]
During a campaign	Check spend, destination health, enquiry quality and delivery issues at the agreed cadence.	[operator]
Monthly	Review useful enquiries and sales feedback. Improve the next month's topics and campaigns.	[business lead]

Content brief template

Audience: [who this helps].

Question: [what they are trying to understand].

Core point: [one useful answer].

Evidence: [source / customer permission].

Action: [read more / enquire / book].

Approver and publication date: [name / date].

Campaign change control

Record the original budget, objective and baseline. Change one material variable at a time where practical. Log what changed, why and when to review it. Pause spending if the destination or enquiry route fails; tell the business owner and record the decision.

See what needs attention.

Use the CRM as the record of the relationship. Use reporting to ask better commercial questions.

Pipeline stage	Move forward when...
New enquiry	A real contact and stated need have been captured.
Contacted	A human contact attempt is logged with a next task.
Qualified	Need, fit, decision process and timing have been explored.
Proposal	An agreed proposal has been issued and a follow-up date set.
Won / lost	Outcome, value where applicable, date and reason are recorded.

Email and automation rules

Only enrol contacts in the agreed audience or sequence when the required permission and purpose are recorded. Respect unsubscribe requests. Stop a nurture sequence when its stop condition occurs, such as a reply or a sales-stage change. Never store passwords in contact notes. Test automation with clearly marked records before enabling it.

Metric	Working definition
Enquiries	Unique valid enquiries in the selected period; exclude spam and tests.
Qualified opportunities	Enquiries that meet the agreed fit and need criteria.
Conversion rate	Qualified opportunities divided by valid enquiries for the agreed cohort.
Acquisition cost	Agreed acquisition spend divided by the agreed outcome count.
Pipeline value	Recorded opportunity values; keep unweighted and weighted views distinct.

Monthly review: verify data quality, identify where interest drops away, hear sales feedback and choose a short improvement list with owners and dates. These definitions require agreement; this sample contains no claimed results.

A handover your team can use.

Your business owns the infrastructure. The documentation should make access, responsibility and routine work clear.

Record	What to capture
Accounts & access	System URL, business owner, administrator, billing owner and recovery contact. Store credentials in the agreed password manager.
Assets & data	Master file locations, export instructions, retention rules and backup responsibility.
Integrations	Connected systems, purpose, trigger, stop condition, technical owner and failure alert.
Support	Primary support route, escalation contact and the agreed response arrangement.

Monthly operating checklist

Check forms and enquiry delivery. Review pipeline hygiene and overdue tasks. Confirm campaign budgets and approvals. Check website links and published content. Review reporting and prioritise improvements. Verify key account access, billing and backup status. Log changes and open issues.

Handover acceptance checklist

- ☐ Approved messaging and brand assets supplied.
- ☐ Agreed website and forms tested end to end.
- ☐ CRM routing and follow-up workflows demonstrated.
- ☐ Campaign, email and tracking setup verified for agreed scope.
- ☐ Business account ownership and recovery access confirmed.
- ☐ Team training completed and instructions provided.
- ☐ Known issues assigned an owner and resolution date.
- ☐ Ongoing operating model and responsibilities agreed.

Prepared by: [name] Accepted by: [name]
Handover date: [date] Next review: [date]