



Ops In Order

THE BUSINESS OWNER'S GUIDE TO
GETTING YOUR DIGITAL OFFICE IN ORDER



Welcome, CEO.

Your clarity starts here.

If you're here, chances are you've built something powerful. A business with heart, hustle, and a whole lot of potential.

But somewhere along the way, the backend got messy. The tabs multiplied. The systems scattered. And suddenly, the business meant to bring you freedom... is draining your energy instead.

I get it, because I've been in the trenches with business owners just like you. For over a decade, I've been the go-to ops person for high-achieving founders, helping them go from barely keeping up to running a business that actually supports them.

I've watched inboxes get tamed, workflows get streamlined, and frazzled CEOs turn into confident leaders who finally have the space to breathe and create again. The results were so transformational that word spread quickly, so quickly that I was turning down work because I simply couldn't take on any more clients.

That's when I knew I had to find a way to help more people. So I took the exact methods I'd been using with founders, practiced and refined them in my own business (because yes, even the systems expert had to get her own house in order), and built **Ops In Order™**.

It's not just a systems framework. It's a soulful shift.

A way to reclaim your time, your focus, and your role as the CEO of your business. And this eBook?

It's your first step into that shift.

Inside, you'll learn how to:

- Build a digital office that actually works for you
- Set up streamlined systems without burning out
- Hire support that aligns with your vision
- Lead with confidence, clarity, and intention

This isn't about perfection. It's about power.

Your business is ready to run smoothly.

You're ready to lead louder.

Let's get your ops in order.

—Jaclyn
Founder, Ops In Order

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Introduction

Running a business? That takes guts.

But running a smooth, aligned, and scalable business? That takes systems.

Most of the business owners I work with are brilliant. Visionary. Magnetic. They have more ideas than time and are constantly chasing the next big thing.

But here's the problem: when you don't have a solid digital office behind the scenes, your ideas stall. Your energy drains. And your freedom? Gone.

You start juggling everything: client delivery, marketing, invoicing, emails, scheduling, launches, systems... all while still trying to be a present parent, partner, and human.

It's too much.

And yet, you keep telling yourself, *"I just need to push through."*



But what if the problem isn't you? What if it's your systems?

Or the fact that no one ever taught you how to run operations that actually support you?

⚡ Here's what happens without a digital office:

- Potential leads slip through the cracks
- Emails get buried and forgotten
- Docs vanish into the black hole of your desktop
- Your team or VA asks the same questions 14 times
- You end each week wondering where your time went

And your big, world-changing ideas?

They get pushed to "someday."

Now imagine this:

- You wake up and know exactly what's on your plate.
- Your tools talk to each other.
- Your assistant knows what to do without asking.
- You finally have space to think, to create, to lead.

That's what this eBook is here to help you create.

In these next pages, you'll learn:

- ✓ What a digital office is (and why it's your new superpower!)
- ✓ The 5 core components every streamlined business needs
- ✓ How to hire your first assistant without the guesswork
- ✓ How to lead like a CEO

This isn't just a guide, it's your permission slip to stop surviving your business and start designing one that supports the life you actually want.

Let's dive in.

Roadmap

CHAPTER 1: WHAT IS A
DIGITAL OFFICE AND WHY
YOU NEED ONE

CHAPTER 2: CORE
COMPONENTS OF A
DIGITAL OFFICE

CHAPTER 3: HIRING YOUR FIRST
ASSISTANT

CHAPTER 4: LEADING WITH
CONFIDENCE

NEXT STEPS



01

WHAT IS A DIGITAL OFFICE AND WHY YOU NEED ONE

A digital office is the invisible backbone of your business.

It's the set of tools, systems, and workflows that let your business run efficiently, even if your team is remote, even if you're out of town, even if you're busy serving clients.

It keeps information organized, tasks on track, and communication clear, so you're not constantly putting out fires or chasing updates.

So... what exactly is it?

Your digital office is the ecosystem of systems, tools, and workflows that help you:

- Keep your files organized
- Manage your time and tasks
- Communicate clearly with your team or clients
- Delegate without having to micromanage
- Maintain consistency, even as you grow

What it might include:

 **Project Management:** Track tasks, timelines, and team responsibilities

 **Document Hub:** Store everything in one searchable, shared space

 **Communication System:** Know where conversations happen (and find them later)

 **Calendar & Scheduling Tools:** Manage appointments, meetings, and important deadlines

 **Standard Operating Procedures (SOPs):** Document how things are done, so nothing gets lost when someone's out or you're ready to delegate.

Without a digital office, your business can start to feel chaotic. 🌀

With one, it's like flipping on the lights. You see clearly, move faster, and feel like you're finally in control. ✨

When your operations are in order, your vision has room to grow.

**YOU DIDN'T BUILD YOUR
BUSINESS TO CHASE
TASKS. YOU BUILT IT TO
CHANGE LIVES. LET YOUR
SYSTEMS REFLECT THAT.**

Making an Office that Works For You

DEFINING YOUR IDEAL OFFICE

To create a space that truly works for you, consider the elements that will be most helpful to your workflow. If you run a company with various moving parts, like order processing and production stages, task management may be a top priority. If you have a lot of collateral to manage, organization will be key.

Use this space to brainstorm and design your ideal digital setup.

THE ENERGY BEHIND ORGANIZATION

With your digital office organized, you'll not only streamline your workflow but also create a sense of clarity and focus that fuels productivity and fosters a more intentional, efficient work environment. Use this space to brainstorm how you want your digital space to feel.



02

CORE COMPONENTS OF A DIGITAL OFFICE

Setting up your digital office doesn't have to be overwhelming—it just needs to be intentional. It's about building a foundation that supports your flow, protects your time, and sets your business up to grow without burning you out. Think of this as the backbone of your business, quietly doing its job in the background while you lead, create, and rest.

Here are the five foundational systems every small business needs.

1. Project Management

The shared brain of your business.

This is where your team tracks what needs to be done, who's doing it, and when it's due, so nothing slips through the cracks.

🌟 *Examples:* Asana, Trello, Monday

CEO Move: Use it daily. Build your week from it. Train your team on it. Let it be your anchor.

2. Document Hub

One home for everything.

This is where it all lives—contracts, SOPs, branding files, templates, invoices. No more digging through inboxes or asking your assistant, “Did you see that Canva link?”

🌟 *Examples:* Microsoft Teams, Google Drive, Dropbox, Notion

Pro Tip: Create clear folder names, avoid desktop clutter, and version your docs so nothing gets overwritten at 2 AM.

3. Communication System

Your team doesn't need a dozen channels. They need one that works.

Decide where conversations occur, both internally and externally, and establish clear expectations. Your inbox (and brain) will thank you.

✨ Examples:

- Slack: for fast, internal chats
- Voxer: for real-time voice messaging
- Email: for formal, external updates

Rule of thumb: Don't make your team guess where to message you.

4. Calendar & Scheduling Tools

Protect your time like it's a sacred asset, because it is.

Your calendar isn't just a to-do list. It's a boundary. A strategy. A way to make sure your energy goes where it matters most.

✨ Examples: Google Calendar, Calendly, Acuity

CEO Tip: Block out focus time, CEO time, and recovery time.

5. Standard Operating Procedures (SOPs)

Your "I don't have to do this forever" documents.

SOPs are simple guides for how things are done—so that you don't have to be the only one who knows how to do them.

They don't have to be fancy. They just have to be clear.

✨ How to create them:

📺 Record a Loom walking through a task

📝 Drop step-by-steps into Notion or Google Docs

⚙️ Use tools like Scribe to auto-generate workflows

Remember: Freedom isn't found in hustle. It's found in documentation.

A streamlined digital office isn't just about tools, it's about clarity, flow, and freeing your time to focus on what matters most.



03

HIRING YOUR FIRST ASSISTANT

If you're spending more time inside your inbox than inside your zone of genius, it's time to hire an assistant.

Hiring your first EA (Executive Assistant) is one of the most high-impact moves you can make as a small business owner.

Done right, it's the shift that frees you from busywork so you can focus on growth, creativity, and leadership.

When should you hire an EA?

- You're drowning in admin and client delivery is slipping
- You open your email and instantly feel stressed
- Deadlines sneak up on you (or blow past you)
- You catch yourself thinking, *"If I could clone myself, I would."*

What to look for in an EA:

You're not just hiring a pair of hands, you're hiring a brain, a vibe, and a partner in productivity. Look for someone who is:

- Organized & proactive: they think two steps ahead
- Tech-savvy: tools don't scare them; they geek out over them
- Aligned with your values: your pace, your style, your mission
- Energized by behind-the-scenes work: they thrive in support roles

 **Pro Tip:** Consider someone who can also leverage AI tools to automate repetitive tasks. This means they're not just working hard. They're working smart.

Where to find an EA:

- Referrals from your network
- Online job boards (Belay, Great Assistant, Upwork, LinkedIn)
- Virtual assistant agencies that specialize in small business support

Ask situational questions or give mini assignments like, “If I have three product launches in one month, how would you keep my calendar organized?” OR “If my inbox were a mess, what’s your step-by-step process to clean it up?” You’re looking for problem solvers, not just task takers!

What to Do When You Bring an Assistant Onboard

So you’ve found the perfect assistant for your team. Congratulations, that’s the hard part!

But once you have an A+ team member in place, the real work begins: keeping them.

Retention isn’t just about salary or perks; it’s about creating a work environment where your assistant feels valued, empowered, and invested in the company’s success.

Check out the next page to get started with an onboarding plan.

**YOUR UNIQUENESS IS YOUR STRENGTH.
EMBRACE IT, AND CREATIVE IDEAS WILL
START TO FLOW.**



1. Start with a strong onboarding

- Share your vision and company values
- Explain your systems (or work together to build them)
- Set communication expectations (response times, preferred channels)

2. Delegate slowly and clearly

- Don't overwhelm your EA by handing them your entire to-do list in Week 1.
- Start with a few clear tasks.
- Give feedback and make adjustments early.

3. Empower your EA to improve your systems

- A good EA will spot inefficiencies and suggest improvements.
- Create a culture where they feel supported offering ideas.

4. Keep your digital office evolving

- Your systems don't have to be perfect. They just have to work for you.
- * Review your setup quarterly and adjust as needed to accommodate growth.

5. Establish a regular meeting rhythm.

- Create a plan to meet with your assistant on a regular basis.
- This helps establish a flow of communication where both of you can ask questions, share updates, and have micro-training sessions to learn more projects.
- A suggestion is at least once a week during the first few months. Some teams thrive with quick ten-minute meetings at the start of the workday to set goals.



04

LEADING WITH CONFIDENCE

Your Role Empowered

Hiring help doesn't mean letting go of control.
It means stepping into the role you were always meant to play: CEO.

And here's the thing: when you've spent years doing all the work yourself, it can feel strange to shift into leadership mode.

But this is the growth edge.

This is where your business evolves—and so do you.

Because when you **lead with confidence, you inspire others to be a better version of themselves**. This can feel unfamiliar at first, especially for those who've been conditioned to over-function, over-apologize, or stay in “helper” mode, but this is where real leadership begins.

1. Own your voice.

You're not “bossy” for having standards.

You're a leader for setting them.

You have the right to:

- Ask for clarity
- Speak up when something's not working
- Change a process that's slowing things down
- Protect your time and your vision

2. Set clear boundaries.

- You don't need to be available 24/7 to be a good leader.
- Clear expectations, scheduled check-ins, and structured workflows create freedom for everyone involved.

3. Know your rights and responsibilities.

Your rights as a CEO:

- Expect professionalism and respect from your team
- Delegate without guilt
- Lead from vision, not from reaction
- Make aligned decisions without apology

Your responsibilities as a CEO:

- Communicate with clarity and kindness
- Give feedback early and often
- Stay rooted in your values as you scale

4. Trust your instincts:

- You don't need to follow someone else's blueprint if it doesn't feel aligned.
- Whether it's how you hire, what tools you use, or how you set up your calendar, you get to decide what works best.

Empowered operations don't just support your business, they support you.

And when you lead from this place of clarity, ownership, and confidence, your entire business shifts.

Your time expands.

Your energy lifts.

Your impact grows.





Conclusion

**YOUR AUTOMATED
OFFICE AWAITS**

You didn't start your business to spend your days buried in emails, chasing overdue tasks, or wondering where your time went.

You started it to make an impact, serve your clients, and create freedom, the kind that lets you breathe, think, and lead.

A streamlined digital office is the foundation for that freedom.
It gives you structure without suffocation.

It holds your business steady so you can grow without burning out.

It frees you to focus on what you do best while everything else runs smoothly in the background.

Here's what you know now:

- What a digital office is and why it matters
- The five core systems that keep your business humming
- How to hire and onboard your first assistant with ease
- How to lead with confidence, clarity, and boundaries

The next step?

Implementation.

Because knowing what to do is one thing.

Setting it up so it actually works for you—that's where the transformation happens.

Your Invitation

If you're ready to go from scattered and reactive to streamlined and intentional, I'd love to help you make it happen.

My course, Ops In Order™: The Digital Office Blueprint for Small Business Owners, is coming soon and it's designed to walk you step-by-step through building your own customized, scalable digital office.



If you want to be the first to know when doors open (and maybe get a little early-bird love), send me a quick message that says "I'm in!"

I'll make sure you're on the insider list so you don't miss a thing.

Your business is ready.

Your future is ready.

Let's get your ops in order.