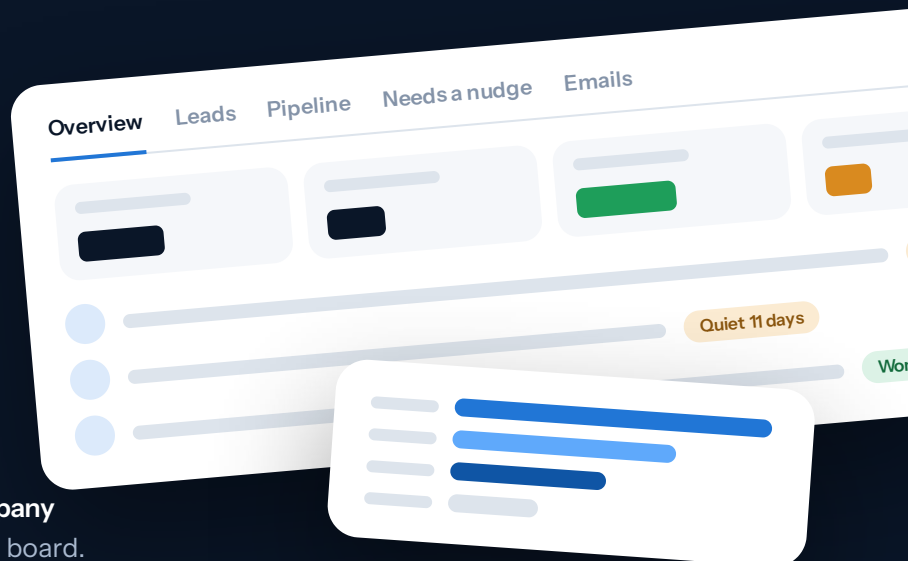


The Architect Blueprint

Plan your board on one page.



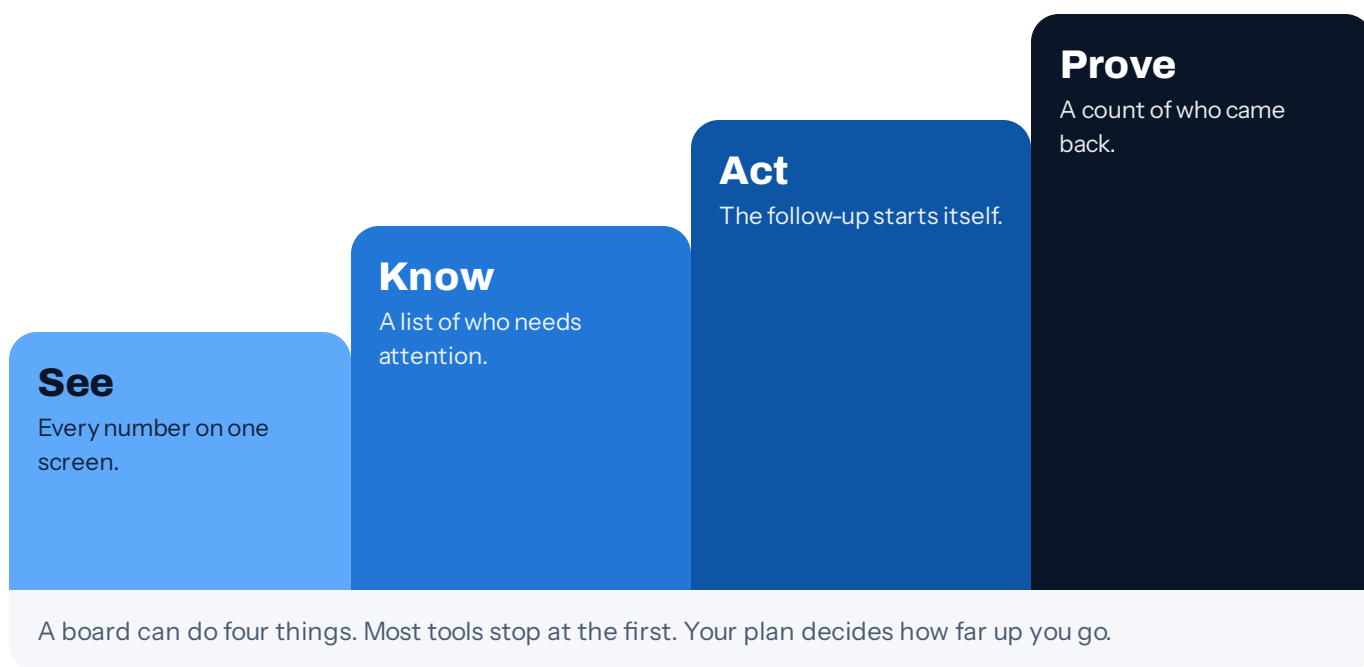
A planning worksheet from Funnel Repair Company
The six decisions we make before we build a live board.

Start here

A board is only as good as the plan behind it.

A board that shows every number is easy to build and easy to ignore. The ones that get opened every morning start from a plan: the questions your team keeps asking, the tools that hold the answers, and what should happen when something stalls.

This is the planning sheet we work through before we build one. Six short parts, then one page that pulls it together. If you get stuck on a part, that is useful too. It shows you where your data has a gap.



Use a pen

Print it, or fill it in on a tablet. Rough answers are fine.

Go in order

Each part feeds the next. The questions come before the tools.

Finish on one page

The last page is your board plan. That is the page to share.

1

The questions

Start with the questions, not the tools.

Write the questions people keep asking you. The ones that send someone digging through three tools to answer.

From a real build

Our first board started with one question from a program's president: where is every student right now? That question became the first tab.

Questions we keep getting asked

1

2

3

4

5

Circle the two you would check every morning. Those go at the top of your board.

2

The tools

List every tool that holds part of the answer.

Your CRM, your email tool, your store, your ad accounts. Write what each one knows.

From a real build

On one board, the CRM held the deals and the email tool held the leads. Neither could answer "which campaign makes customers" alone. Together they could.

Tool	What it holds	Can it connect?

A tool can connect if it has an API or a connector. Not sure? Write "not sure" and we will check it for you.

3

The stages

Name the steps from first touch to customer.

Write the steps a person moves through, in order. Under each one, write which tool knows when they get there.

From a real build

A coffee service company's steps were already sitting in its CRM. We did not invent them. Those five words became the board's pipeline.

Lead

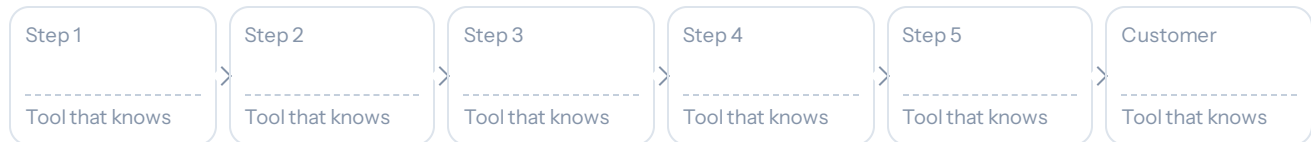
Tasting booked

Tasting held

Proposal sent

Won

Our steps



Put a star where people stall most. That is where your Needs a nudge list starts.

4

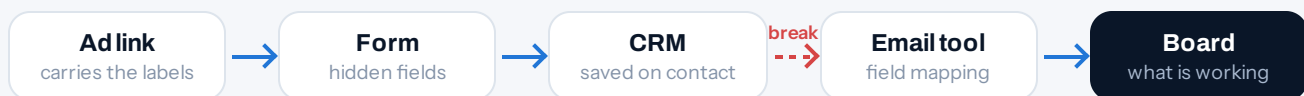
The trail

Check that the trail survives the trip.

When someone clicks an ad, the link carries three labels: the campaign, the source, and the ad. For a board to show what is working, all three have to reach the tool your board reads.

From a real build

On one build, every lead showed up as "not marked." The form captured the campaign name and the CRM stored it. It was never passed to the email tool the board was reading. One missing field mapping, found the day before the ads went live.



Trail check

- ☐ Every ad link carries a campaign, a source, and an ad name: `utm_campaign` `utm_source` `utm_content`
- ☐ The form has a hidden field for each one
- ☐ Each one is saved on the contact in the CRM
- ☐ Each one is passed along to any second tool
- ☐ A test lead arrives with all three filled in

5

The nudge

Decide what "gone quiet" means.

The second level of a board is a list of who needs attention. To build it, you have to say what quiet means for your business, and what should happen next.

From a real build

On a lead board we started with a simple rule: no activity for 10 days. It is a starting point. You tune it once you see who lands on the list.

Our rule

Someone has gone quiet when _____ days pass without _____

When that happens, we want to

- ☐ See them on a list
- ☐ Send a message automatically
- ☐ Give a person a task. Who: _____

One way to set it up: three messages, then a person.



Day 0

Message 1 goes out



Day 5

Message 2



Day 10

Message 3



Day 14

No action? A task for a person

6

Who sees what

Decide who sees which numbers.

Some numbers are for the whole team. Some are for owners only. Decide now, so the board is built with the right doors.

From a real build

On our boards, ad spend and the brand settings sit behind an Owner login. Everyone else sees leads, stages, and who needs a nudge.

Number or section	Everyone	Owners only
<i>Example: ad spend</i>		✓

Your board plan

Copy your answers here. This page is everything a builder needs to start.

1 Our two morning questions

2 Our tools

3 Our steps, in order

4 The trail

- ☐ Campaign reaches the board's tool
- ☐ Source reaches it
- ☐ Ad name reaches it

5 Quiet means

_____ days without _____
Then we _____

6 For owners only

Want to know which of your tools connect?

Send a photo of this page to funnelrepaircompany@gmail.com, or run the stack check at funnelrepaircompany.com. You will hear which tools we connect today, and what your board could show first.

