

OPERATIONS & EXECUTION WORKBOOK



PHASE 01: WEEKS 1-4 Marketing Systems & Bottlenecks

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LESSON 01

MAPPING YOUR MARKETING SYSTEMS

TOPIC 01

Marketing Systems Audit

ACTIVITY: SYSTEMS AUDIT SNAPSHOT

Instructions:

You are going to identify every marketing-related system in your studio.

Follow these steps:

1. Read through the pre-filled systems and add any additional ones you use
2. For each row:
 - Write how often it happens (daily, weekly, inconsistent, seasonal)
 - List everyone involved (including yourself)
 - Mark YES or NO if it is clearly documented somewhere
 - Rate the friction:
 - » ● Smooth (runs easily without issues)
 - » ● Annoying (inconsistent or requires effort)
 - » ● Painful (breaks, confusing, or time-consuming)
3. If you're unsure, choose the answer that reflects what *actually happens most often*

 **Goal:** Get a clear snapshot of how your marketing actually runs today.

SYSTEM	FREQUENCY	WHO'S INVOLVED	IS IT DOCUMENTED?	FRICTION (●●●)
Trial/Offer Promotion				
Referral Program				
Community Outreach				
Website/Landing Pages				

cont. on next page



SYSTEM	FREQUENCY	WHO'S INVOLVED	IS IT DOCUMENTED?	FRICTION (●●●)
Lead Tracking/CRM				
Reporting/Analytics				
Other:				
Other:				
Other:				

REFLECTION:

1. Which systems feel the most smooth and repeatable?

2. Which systems feel the most inconsistent or neglected?

3. Where are you personally the most involved?



LESSON 02

IDENTIFYING BOTTLENECKS

TOPIC 01

Friction Audit

ACTIVITY: BOTTLENECK IDENTIFIER

Instructions:

Now you will identify where your systems are breaking down.

Follow these steps:

1. Look at each system from Lesson 1
2. For each system, list multiple breakdown points (not just one)
3. For each issue:
 - Describe exactly where it breaks (specific step)
 - Explain why (lack of time, unclear process, no owner, etc.)
 - Estimate how often it happens (daily, weekly, occasionally)
4. Repeat systems if needed to capture multiple issues

The more specific you are, the easier it will be to fix.

SYSTEM	WHERE DOES IT BREAK DOWN?	WHY?	HOW OFTEN?
Paid Ads			
Paid Ads			
Organic			
Organic			

cont. on next page



SYSTEM	WHERE DOES IT BREAK DOWN?	WHY?	HOW OFTEN?
Nurture			
Nurture			
Referrals			
Referrals			
Tracking			
Tracking			
Other			
Other			

REFLECTION:

1. Which issue shows up the most often?
2. Which issue is costing you the most opportunities?
3. What feels the most frustrating day-to-day?



TOPIC 02

Bottleneck Scorecard

ACTIVITY: BOTTLENECK PRIORITIZATION

Instructions:

You will now prioritize which bottlenecks to fix first.

Follow these steps:

1. List each bottleneck from the previous activity
2. Score each one:
 - Impact: How much it affects results (1-5)
 - Frequency: How often it happens (1-5)
 - Effort: How hard it is to fix (1-5)
3. Use your judgment—perfection is not required
4. Identify the top 2-3 bottlenecks with:
 - High Impact
 - High Frequency
 - Reasonable Effort

These will be your focus for the next 2 weeks.

BOTTLENECK	IMPACT (1-5)	FREQUENCY (1-5)	EFFORT (1-5)	PRIORITY



👉 Write your TOP 2-3 _____

REFLECTION:

1. Which bottlenecks are you surprised by?

2. Which ones have you been tolerating?

3. Which ones feel like quick wins?



LESSON 03

BUILDING YOUR FIX PLAN

TOPIC 01

Fix Strategy Grid

ACTIVITY: SIMPLIFY / AUTOMATE / DELEGATE / ELIMINATE

Instructions:

You will now decide how to fix your top bottlenecks.

Follow these steps:

1. Write your top bottlenecks in the left column
2. For each one, choose ONE primary strategy:
 - Simplify > Reduce Steps
 - Automate > Use Tools
 - Delegate > Assign Ownership
 - Eliminate > Remove Completely
3. You may use more than one strategy if needed—but keep it simple

 **Avoid overengineering. Focus on Practical Solutions.**

BOTTLENECK	SIMPLIFY	AUTOMATE	DELEGATE	ELIMINATE



REFLECTION:

1. Which fixes feel easiest to implement?
2. Which require team support?
3. Where might you be overcomplicating things?

TOPIC 02

System Redesign

ACTIVITY: BEFORE vs AFTER

Instructions:

Choose ONE bottleneck and redesign the system.

Follow these steps:

1. Break the current process into steps
2. Rewrite each step in a simpler, improved way
3. Assign ownership for each step
4. Keep it clear enough that someone else could follow it

This should become a repeatable system.

STEP	CURRENT PROCESS	IMPROVED PROCESS	OWNER
1			
2			
3			
4			

cont. on next page



STEP	CURRENT PROCESS	IMPROVED PROCESS	OWNER
5			
6			
7			
8			

REFLECTION:

1. Is this system simpler than before?
2. Could someone else run it without you?
3. What might still break?

TOPIC 03

Responsibility Map

ACTIVITY: OWNERSHIP CLARITY

Instructions:

Assign clear ownership for each system.

Follow these steps:

1. List each system you improved
2. Assign ONE owner per system
3. Define exactly what they are responsible for
4. Decide how often you will check in

Clarity prevents bottlenecks from returning.



SYSTEM	OWNER	RESPONSIBILITIES	CHECK-IN CADENCE

REFLECTION:

1. Where is ownership still unclear?
2. What are you still holding onto?
3. What would improve if you stepped back?



LESSON 04

IMPLEMENTATION & TESTING

TOPIC 01

Execution Plan

ACTIVITY: 7-DAY IMPLEMENTATION TRACKER

Instructions:

Plan how you will implement your changes this week.

Follow these steps:

1. Break your plan into daily actions
2. Assign an owner for each action
3. Track progress as you go
4. Adjust if needed – progress over perfection

 Keep this realistic and achievable.

DAY	ACTION	OWNER	STATUS	NOTES
Day 1				
Day 2				
Day 3				
Day 4				
Day 5				
Day 6				
Day 7				



REFLECTION:

1. What slowed you down?
2. What helped you stay consistent?
3. What will you adjust next time?

TOPIC 02

Results Tracker

ACTIVITY: IMPACT MEASUREMENT

Instructions:

Measure what changed after implementation.

Follow these steps:

1. Write your baseline (before changes)
2. Track what improved after changes
3. Add notes for context

 Focus on progress, not perfection.

METRIC	BEFORE	AFTER	CHANGE	NOTES
Lead Consistency				
Follow-up Speed				
Marketing Consistency				
Time Spent				

cont. on next page



METRIC	BEFORE	AFTER	CHANGE	NOTES
Team Clarity				
Other:				
Other:				
Other:				

REFLECTION:

1. What improved immediately?
2. What didn't improve yet?
3. What does this tell you about your systems?

TOPIC 03

Refinement

ACTIVITY: ADJUSTMENT LOG

Instructions:

Refine your system based on results.

Follow these steps:

1. Identify what worked well
2. Identify what didn't
3. Decide what to adjust moving forward

 This is how systems get better over time.



WHAT WORKED	WHAT DIDN'T	ADJUSTMENT

REFLECTION:

1. What is now easier than before?

2. What still feels inefficient?

3. What will you improve next?



PHASE 1 ACTION PLAN

TOP 5 BOTTLENECKS IDENTIFIED:

1

2

3

4

5

TOP 3 CHANGES IMPLEMENTED:

1

2

3

BIGGEST INSIGHT:

ONE COMMITMENT MOVING FORWARD: