

Client Case Studies

Real problems. Real systems. Real results.

CASE STUDY 01

Coaching CRM & Automated Reporting System

From Messy Spreadsheets to a Centralized Coaching CRM in Notion

Tools

Notion · Make · Google Apps Script · Google Sheets

Client

Coaching business · team of 4 coaches

Key takeaway: *The issue wasn't the tools — it was the system. By redesigning the workflow and connecting the tools properly, the business now runs with more clarity and less manual work.*

CASE STUDY 02

Workflow Automation · One-Click Delivery System

From Manual Sending to One-Click Automated Delivery

Client

Coaching program · weekly delivery operations

Tools

Google Sheets · Google Apps Script · Gmail

Key takeaway: *The goal wasn't full automation — it was removing unnecessary manual work while keeping the process simple and reliable.*

CASE STUDY 03

Meeting Intelligence · Task Management Automation

From Scattered Meeting Notes to Automated Task Tracking

Client	Service business · remote team
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Tools	Make · Notion · Fathom
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Key takeaway: *The real value wasn't just summarizing meetings — it was turning conversations into trackable, actionable systems.*

CASE STUDY 04

Full Business Operating System

Building a Scalable Project Management System Using PARA

Client	Growing service business · team of 3–8
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Tools	Notion · PARA Method
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Key takeaway: *The real transformation wasn't just organizing tasks — it was building a system where strategy, execution, and knowledge are all connected.*

CASE STUDY 05

Attendance Tracking · Automated Communication

From Manual Attendance Tracking to Automated Makeup Reminders

Client

Coaching program · multi-cohort weekly sessions

Tools

Google Sheets · Google Apps Script · Airtable · Gmail

Key takeaway: *You don't always need full automation — sometimes the win is removing the repetitive steps while keeping the process reliable and simple.*

Want to see the full breakdown of any of these? **Send me a message**
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