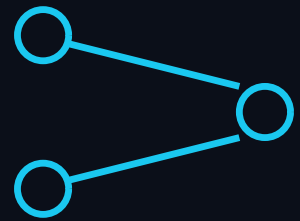


**SITE1X**

WORKFLOW SYSTEMS BUILT BY A BUSINESS OWNER/OPERATOR

A SITE1X FIELD GUIDE

# The Operator's Workflow Playbook



7 quick-win systems for owner-operated businesses that have outgrown off-the-shelf software.

WHY THIS GUIDE

# Built from real work — not theory.

I'm Scott. I've run a print and promotional products company since 2009. I didn't learn to build software in a classroom — I learned it fighting tools that never fit how my business actually worked.

Every workflow in this guide is one I've built and run inside real businesses, most of them my own. None of it is hypothetical — these are the systems I reach for first when a business is drowning in manual work. And because the heavy lifting is done by an operator who's lived the problem, not a team billing by the hour, you get a system that fits how you actually work — without the agency overhead.

If any of these sound like a problem you're living with right now, that's exactly the conversation I want to have.

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## Scott Robison

Founder, Site1x · Operator since 2009

## 1 Quote-to-Production Pipeline

**PROBLEM** Quote requests pile up in an inbox, and someone retypes every detail into your system by hand. Things slip.

**WE BUILD** Email → an AI-assisted quote draft → your project board → production, with zero manual re-entry.

**BUILT WITH** Monday.com · Make · Claude API

## 2 Client Approval Portal

**PROBLEM** Approvals happen over email and text, get lost, and “I never approved that” becomes a costly reprint.

**WE BUILD** A branded portal where clients review, approve, and lock work — with version control and a full audit trail.

**BUILT WITH** Next.js · Vercel · Monday.com

### 3 Order Intake Automation

**PROBLEM** Online and email orders get copied by hand into your operations system — slow, and easy to get wrong.

**WE BUILD** Every order flows in automatically with its files, notes, and customer info already attached.

**BUILT WITH** Shopify · Make · Monday.com

### 4 AI-Ready Storefront

**PROBLEM** Customers increasingly ask ChatGPT for recommendations — and your store is invisible to them.

**WE BUILD** Product data, schema, and content structured so AI assistants can read, surface, and recommend you.

**BUILT WITH** Shopify · Structured data · GEO/AEO

*Real result: a \$1,156 order that came from a ChatGPT recommendation — not Google.*

## 5 CRM Cleanup & Intake

- PROBLEM** Your contact list is a tangle of duplicates and junk entries, so nobody on the team trusts it.
- WE BUILD** A de-duplicated, segmented CRM with clean automated intake, so every new contact lands in the right place.
- BUILT WITH** Monday CRM · Make · Validation

## 6 Branded Transactional Email

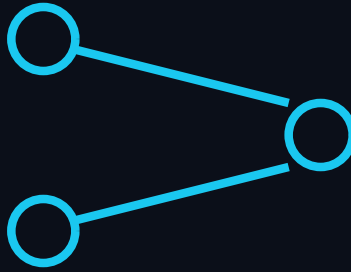
- PROBLEM** Order confirmations and status updates are manual — or worse, they're just not happening.
- WE BUILD** Automatic, on-brand emails (confirmation, proof-ready, shipped) sent reliably from your own domain.
- BUILT WITH** Resend · Your domain · Webhooks

## 7 One-Screen Operations Dashboard

**PROBLEM** The numbers you need live in five different tabs, so you never see the full picture in one place.

**WE BUILD** A single dashboard pulling orders, status, and revenue from your tools into one source of truth.

**BUILT WITH** Next.js · Monday · Shopify APIs



READY TO SHIP ONE OF THESE?

# Stop forcing your business into someone else's software.

Every project is fixed-price and scoped up front — no hourly surprises.

Book a 30-minute call: no pitch, just two operators figuring out  
if there's a fit.

[Book a Discovery Call](#)

[site1x.com](https://site1x.com)

[hello@site1x.com](mailto:hello@site1x.com)

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*Built by an operator, not an agency.*