DAILY OPERATIONS · SAMPLE DELIVERABLE

Operations Tracker and Task Boards

For: Maple & Moss Wellness Studio (fictional) · and other example boards

SAMPLE · FICTIONAL DATA

Week ending: Fri 20 November 2026 **Built in:** Google Sheets (also works in Excel)

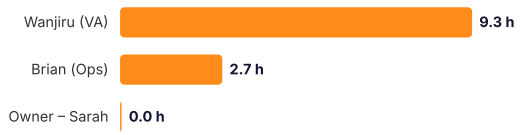
Updated by: Bridge Imara, every working day

Recurring tasks tracked	Overdue	Done this week	On time	Recurring work
16	2	6 of 8	83%	12 h
across 6 areas	flagged red below	one-off tasks	of tasks done this week	per week, now off the owner's plate

Recurring tasks (extract)

Task	Frequency	Owner	Next due	Status
Confirm next day's class bookings and send reminders	Daily	Wanjiru (VA)	21 Nov	Done
Reply to website and Instagram enquiries	Daily	Wanjiru (VA)	21 Nov	Done
Reconcile card payments against bookings	Weekly	Brian (Ops)	23 Nov	Done
Send weekly newsletter draft for approval	Weekly	Wanjiru (VA)	24 Nov	Waiting on client
Publish instructor rota for next week	Weekly	Brian (Ops)	21 Nov	In progress
Restock check: mats, towels, retail	Fortnightly	Brian (Ops)	18 Nov	Not started
Membership renewals: send reminders	Fortnightly	Wanjiru (VA)	25 Nov	In progress
Client feedback survey sent	Monthly	Wanjiru (VA)	18 Nov	Blocked
Monthly sales and attendance report	Monthly	Brian (Ops)	30 Nov	Not started

Recurring work per week, by owner



New clients onboarding

Client	Progress	Next step
A. Mwangi	100%	Onboarded
J. Thompson	83%	Day-7 check-in
L. Okafor (corporate)	67%	First class booked
P. Hughes	33%	Booking account set up
R. Achieng	17%	Intake form back

This page is a snapshot of the working spreadsheet "Sample Operations Tracker". Overdue dates turn red and status colours update automatically.

Bridge Imara

Operations Tracker and Task Boards

SAMPLE · FICTIONAL DATA

Trello **Studio operations board** – one card per task, moved left to right as work progresses. Clients see everything in one place without asking for updates.

Requests in 2

- Corporate quote: Nairobi law firm (12 staff) — Due 24 Nov — W
- New retail stock idea from Sarah

+ Add a card

This week 3

- Draft December timetable — Fri — W
- Gift-card promotion emails — Thu — W
- Compare towel laundry suppliers — Fri — B

+ Add a card

Doing 2

- Update instructor bios on website — Fri — W
- Instructor rota – week 48 — Fri — B

+ Add a card

Waiting on client 2

- Book photographer for January — Approval — W
- Newsletter sign-off — Approval — S

+ Add a card

Done ✓ 3

- Saturday sound-bath booking live — 17 Nov — B
- 3 corporate quotes sent — 18 Nov — W
- Welcome email link fixed — 16 Nov — B

+ Add a card

Labels: Sales · Timetable · Marketing · Operations. Initials show the owner: W = Wanjiru (VA), B = Brian (Ops), S = Sarah (owner).

How the board is set up

- 5 lists that follow the real workflow
- Colour labels by area
- Due dates and one owner per card

Rules we added

- Card moved to Done → due date marked complete
- Every Monday: weekly rota card created automatically
- Overdue card → owner gets a reminder

Why it helps

The owner opens one board and sees what's moving, what's waiting on her, and what's done – instead of chasing updates on WhatsApp.

Bridge Imara

Operations Tracker and Task Boards

SAMPLE · FICTIONAL DATA

We set up and run boards in whichever tool you already use. The same discipline applies in each: one owner, one due date, one clear status.

Asana **Client project – list view**

Task	Assignee	Due	Status
▾ Onboarding			
○ Send welcome pack	Faith	18 Nov	Done
○ Kick-off call scheduled	Faith	19 Nov	Done
○ Access checklist completed	Client	21 Nov	Waiting on client
▾ Delivery			
○ Q4 board pack – draft financial summary	James	26 Nov	In progress
○ Stakeholder interviews (6)	James	28 Nov	In progress
○ Interview notes summarised	Faith	1 Dec	Not started
▾ Admin			
○ Invoice 2 of 3 sent	Faith	30 Nov	Not started
○ Weekly status email	Faith	Every Fri	Done

Sections follow the stages of the work. Recurring tasks (like the weekly status email) repeat automatically.

monday.com **Operations board – grouped by week**

Item	Owner	Status	When
This week			
Client welcome calls (3)	Faith	Done	Mon–Wed
Proposal: Kilifi retreat	James	Working on it	Thu
Supplier contract renewal	Faith	Stuck	Fri
Next week			
December payroll prep	Brian	Not started	Mon
Year-end client survey	Faith	Not started	Wed

Colour-coded status columns make blockers obvious. "Stuck" items are raised in the Monday report.

What you get with Daily Operations

One live tracker

Recurring and one-off tasks, owners, due dates and status, in a spreadsheet or task board.

Nothing slips

Overdue work is flagged automatically and chased before it becomes a problem.

Your time back

In this example, 12 hours a week of recurring work moved off the owner's plate.

Board layouts are simplified illustrations of how we organise work in each tool, using fictional businesses and data. Trello, Asana and monday.com are trademarks of their owners; Bridge Imara is not affiliated with them.