Bridge Imara

SAMPLE DELIVERABLES PACK

Real work. Practical outputs. Visible results.

Examples of what you receive when you work with Bridge Imara, across our five service areas.

Please note: every business, person and number in this pack is made up. We never share client work without permission. Each sample shows the format, detail and standard you can expect.

What's inside

#	Sample	Service	Length
01	**Weekly Administrative Support Report** What we completed, decisions you need to make, hours used and left.	Virtual Assistant Support	2 pages
02	**Operations Tracker and Task Boards** Live tracker, plus boards set up in Trello, Asana and monday.com.	Daily Operations	3 pages + spreadsheet
03	**SOP: New Client Onboarding** Purpose, roles, process map, steps, checklist and version history.	Systems & Process Design	3 pages
04	**Project Status Report and Plan** One-page weekly status report and a full project timeline.	Project Management	2 pages + spreadsheet
05	**Automation Workflows** Zapier and Make workflow maps, Apps Script code and time saved.	Automation & Integrations	2 pages
06	**Sales and Operations Dashboard** A live dashboard built on the client's own data.	Reporting (Looker Studio)	1 page
07	**Example Results: The First 90 Days** The kind of change a 90-day engagement aims for.	Illustrative example	1 page

How we work

- Start with 5 prepaid hours – no retainer
- Estimate agreed before work starts
- Monday report every week
- We work in your tools and accounts

Talk to us

Book a free 30-minute call at **bridgeimara.com** or email **info@bridgeimara.com**. We'll recommend the right support and estimate the hours.

Trello, Asana, monday.com, Zapier, Make, Xero, Google, Google Sheets and Looker Studio are trademarks of their respective owners. Bridge Imara is not affiliated with them.

VIRTUAL ASSISTANT SUPPORT · SAMPLE DELIVERABLE

Weekly Administrative Support Report

For: Harbourline Coaching (fictional) · UK leadership coach

SAMPLE · FICTIONAL DATA

Week: Mon 17 – Fri 21 November 2026 **Prepared by:** Bridge Imara (your VA: Faith)

Bundle: 10 hours, bought 3 Nov

Tasks completed	Hours used	Hours left	Needs you
18	4.0	3.5	3
this week	this week	of 10 · 6.5 used so far	decisions below

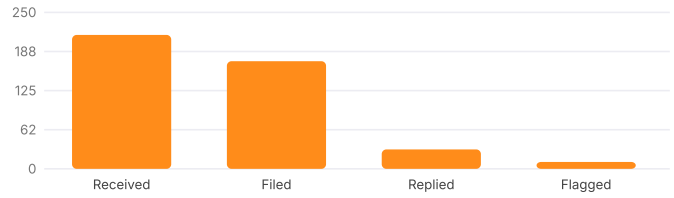
Completed this week

- ✓ **Inbox:** 214 emails handled – 172 filed, 31 replied, 11 flagged for you
- ✓ **Calendar:** 3 discovery calls and 2 client sessions booked; December cleared of clashes
- ✓ **Client admin:** 4 session notes formatted and filed in client folders
- ✓ **Finance:** 6 invoices raised and sent (£2,940 in total); 1 overdue invoice chased and paid
- ✓ **Content:** "Leading Calm Teams" workshop slides tidied and put in your brand template
- ✓ **Research:** 5 podcast guest options with audience size and contact details

Needs your decision

- ! **Approve the December newsletter** – draft in your Drive, "Newsletter / Dec". Needed by Tue 25 Nov to send on 1 Dec.
- ! **Choose a podcast guest** – 5 options in the research sheet. Our pick: Option 2 (largest UK audience).
- ! **Holiday closing dates** – confirm 22 Dec to 2 Jan so we can set your auto-reply and update your booking page.

Inbox at a glance



What we noticed

Enquiries through your website rose to 9 this week (6 last week). 7 came from the "Team Calm" workshop page. Worth featuring that workshop in the December newsletter?

Average reply time to new enquiries: 3 hours 10 minutes (target: same working day).

Bridge Imara

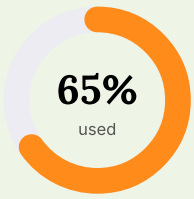
Weekly Administrative Support Report

SAMPLE · FICTIONAL DATA

Next week's plan

- Send December newsletter (once approved)
- Book podcast guest and send prep notes
- Year-end invoice check: list anything unpaid over 30 days
- Set up holiday auto-reply and booking-page notice
- Prepare January workshop registration page draft

Hours summary



Bought: 10.0 hours (3 Nov) · **Used to date:** 6.5 · **Left:** 3.5

At this pace your hours last about one more week. We'll remind you before they run out. Hours never expire within 12 months of purchase.

Time log – this week

Day	Task	Minutes
Mon 17	Inbox triage and replies	40
Mon 17	Book 3 discovery calls	20
Tue 18	Client session notes formatted (4)	30
Tue 18	Invoices raised and sent (6)	25
Wed 19	Inbox triage and replies	30
Wed 19	Workshop slides tidied and branded	30
Thu 20	Podcast guest research (5 names)	25
Thu 20	Calendar clean-up for December	15
Fri 21	Inbox triage, follow-ups and this report	25
	Total	**240 (4.0 hours)**

Every task is logged in our time tracker. You can ask for the detailed log at any time.

Notes

Two new client enquiries asked about group pricing. We've drafted a short reply template for this; it's in "Templates / Group pricing" for your review.

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)

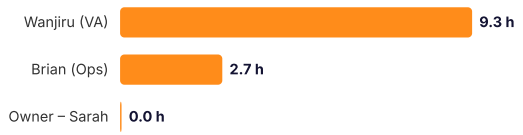
Updated by: Bridge Imara, every working day

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.

SYSTEMS & PROCESS DESIGN · SAMPLE DELIVERABLE

Standard Operating Procedure: New Client Onboarding

For: Summit Peak Consulting (fictional) · SOP CS-01

SAMPLE · FICTIONAL DATA

SOP ID: CS-01 **Version:** 1.2 **Owner:** Operations Lead **Last reviewed:** 10 Nov 2026

Next review: 10 May 2027

1. Purpose

Give every new client the same smooth, professional start, so work begins within 5 working days of signing and nothing is missed.

2. When to use it

Every time a client signs a proposal or buys a bundle. **Not** for one-off tasks under 2 hours (use SOP CS-02 instead).

3. Roles (RACI)

Activity	Client Success (VA)	Consultant	Operations Lead	Client
Welcome email and pack	R	I	A	I
Access checklist	R	I	A	C
Kick-off call	C	R	A	C
Scope approval	I	R	A	C
First-week plan	R	C	A	I
Monday report	R	C	A	I

R = does the work · A = accountable for it being done right · C = consulted · I = kept informed.

4. Tools and templates

Tools

- Gmail / Google Workspace
- Google Drive
- Asana (project templates)
- Google Calendar booking page

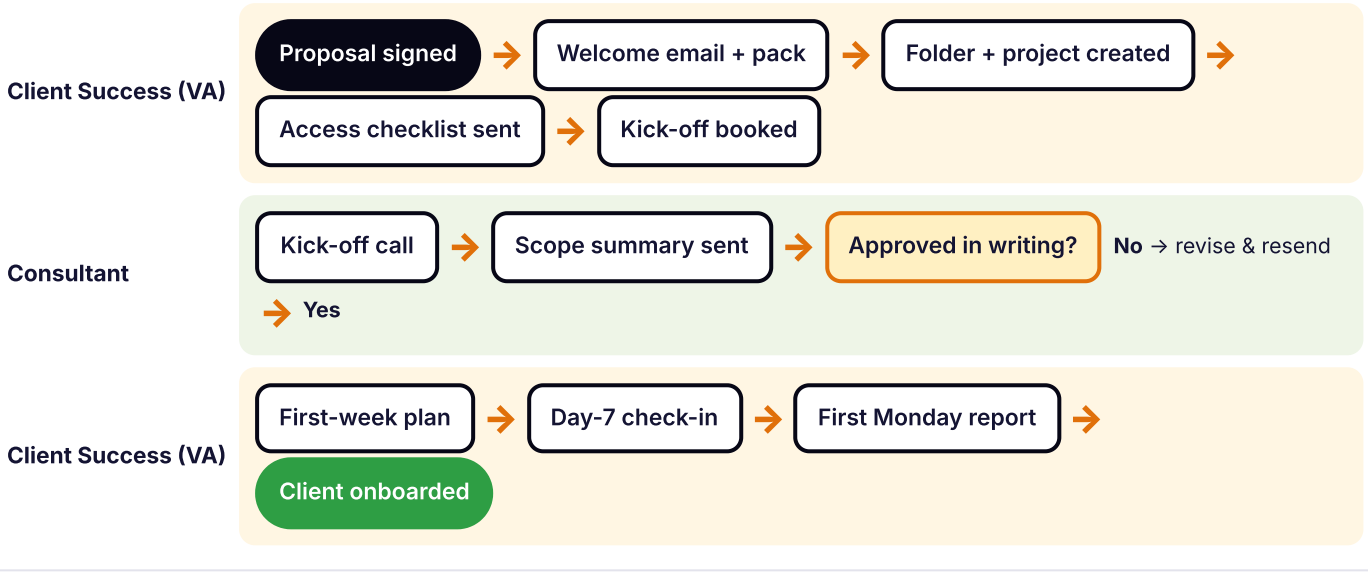
Templates

- Welcome email
- Welcome pack (PDF)
- Access checklist
- Scope summary

Standard

- ✔ Kick-off within 5 working days
- ✔ Scope approved in writing
- ✔ First Monday report on time

5. Process map



6. Step-by-step

#	Step	Who	When	Tool / template
1	Send welcome email and welcome pack	Client Success (VA)	Same day as signed proposal	Gmail template 'Welcome – new client'; Welcome pack PDF
2	Create client folder and project	Client Success (VA)	Day 1	Drive folder template; Asana project template
3	Send access checklist	Client Success (VA)	Day 1	Access checklist form
4	Book kick-off call (45 min)	Client Success (VA)	Within 3 working days	Calendar booking link
5	Hold kick-off call; confirm goals, scope and hours	Consultant	Day 3–5	Kick-off agenda; Scope summary template
6	Send scope summary for written approval	Consultant	Within 24 h of call	Scope summary template
7	Set up first-week plan and recurring tasks	Client Success (VA)	After approval	Asana project; recurring task list
8	Day-7 check-in email	Consultant	Day 7	Template 'Day-7 check-in'
9	First Monday report sent	Client Success (VA)	First Monday after start	Weekly report template

7. Quality checks before day 5

- ✓ Client has received the welcome pack
- ✓ All access requested on the checklist is working
- ✓ Scope, hours estimate and start date approved in writing
- ✓ Recurring tasks entered with owners and due dates
- ✓ Client knows when to expect the first Monday report

8. If something goes wrong

- ! **Client hasn't returned access in 3 days:** send reminder template; after 5 days, call.
- ! **Scope not approved in 2 days:** Consultant follows up by phone.
- ! **Kick-off can't happen within 5 days:** tell the Operations Lead the same day.

9. Access checklist (sent at step 3)

Access needed	How the client gives it	Done
Shared email inbox	Add our team member as a delegate (no passwords by email)	☐
Google Drive folder	Share folder with our work address	☐
Calendar	Share with 'Make changes to events'	☐
Booking / CRM tool	Add as a user on the client's own plan	☐
Accounting software	Invite as 'Standard' user, not admin	☐

The client keeps ownership of every account and subscription. We are added as users and removed when the work ends.

10. Version history

Version	Date	Change	By
1.0	12 Mar 2026	First version	Operations Lead
1.1	4 Jul 2026	Added day-7 check-in	Consultant
1.2	10 Nov 2026	Access checklist: client-owned accounts only	Operations Lead

Sample SOP written by Bridge Imara for a fictional consultancy. Your SOPs are written around how your business actually works.

PROJECT MANAGEMENT · SAMPLE DELIVERABLE

Project Status Report and Plan

For: Blue Acacia Events (fictional) · Website and booking relaunch

SAMPLE · FICTIONAL DATA

Status date: Fri 9 October 2026 (week 5 of 8) **Project manager:** Bridge Imara **Sponsor:** Amina, Founder

Overall status	Progress	Tasks complete	Go-live	High risks
AMBER	70%	8 / 16	23 Oct	1
on schedule; 1 high risk	weighted by task length	none overdue	unchanged	see below

Done this week

- ✔ Design approved by Amina (1 Oct)
- ✔ Homepage and 3 of 5 pages built
- ✔ Payment provider account approved

Next week

- Finish remaining 2 pages
- Booking confirmation emails written and tested
- Start device testing on Thu 15 Oct

Decisions needed

- ! **Refund policy wording** for the booking page – by Tue 13 Oct.
- ! **Launch email date:** Fri 23 or Mon 26 Oct?

Top risks

Risk	Rating	Action
Payment provider delay	High	Approved 6 Oct – closing next week
Photos late	Medium	Placeholders in use
Old links break	Medium	42 redirects prepared

Milestones

Milestone	Due	Status
Goals and scope signed off	7 Sep	Done
Content ready	25 Sep	Done
Design approved	1 Oct	Done
Booking live in test	12 Oct	On track
Website live	23 Oct	On track
Handover complete	30 Oct	Not started

Project Status Report and Plan

SAMPLE · FICTIONAL DATA

Project timeline – each bar shows planned dates; the filled part shows progress. The dashed orange line marks the status date.

Phase	Task	Owner	Start	End
Discover	Kickoff call and goals agreed	Bridge Imara	07 Sep	07 Sep
Discover	Audit current site and booking flow	Bridge Imara	08 Sep	10 Sep
Content	Write content brief	Bridge Imara	10 Sep	15 Sep
Content	Collect photos and testimonials	Client – Amina	14 Sep	21 Sep
Content	Write page copy	Copywriter	16 Sep	25 Sep
Design	Choose design template	Web designer	16 Sep	18 Sep
Design	Design homepage and 4 key pages	Web designer	21 Sep	29 Sep
Design	Client design review	Client – Amina	30 Sep	01 Oct
Build	Build pages	Web designer	02 Oct	13 Oct
Build	Set up online booking and payments	Bridge Imara	06 Oct	12 Oct
Build	Booking confirmation emails	Bridge Imara	12 Oct	14 Oct
Test	Test bookings on phone and desktop	Bridge Imara	15 Oct	20 Oct
Test	Fix issues from testing	Web designer	20 Oct	22 Oct
Launch	Go live and redirect old pages	Web designer	23 Oct	23 Oct
Launch	Announce to mailing list	Client – Amina	26 Oct	26 Oct
Launch	Two-week check and handover	Bridge Imara	27 Oct	30 Oct



Green = complete · Gold = in progress or planned. Built in Google Sheets (working file included: "Sample Project Plan"). We run the same plan in monday.com, Asana or Microsoft Project if that's what your team uses.

Plan

Every task has an owner, start, end and dependency. Dates move automatically when something slips.

Track

Weekly status report every Friday: progress, decisions needed and risks – one page.

Finish

Two-week check after launch and a handover pack, so nothing depends on us.

AUTOMATION & INTEGRATIONS · SAMPLE DELIVERABLE

Automation Workflows: Maps, Code and Results

For: Kilima Home Goods (fictional) · Zapier, Make and Google Apps Script

SAMPLE · FICTIONAL DATA

Automations live	Hours saved	Enquiry reply time	Manual errors
3	≈ 26 h	2 min	0
tested and documented	per month	was 1 working day	in the first 60 days

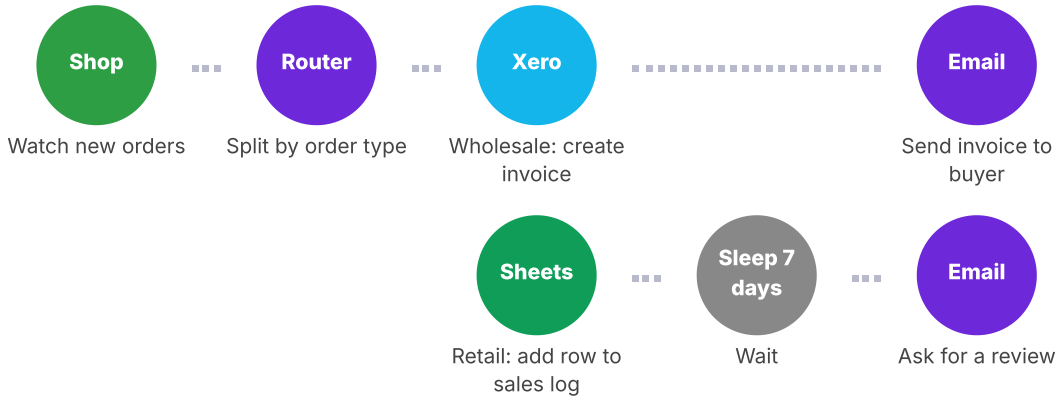
1. New enquiry → CRM → task → reply

Zapier Every website enquiry is logged, assigned and answered within minutes – even at weekends.

1. **TRIGGER** — **Website form (Fluent Forms)**
   New enquiry submitted on the Contact page
2. **FILTER** — **Only continue if...**
   Email does not contain 'test' and service field is filled in
3. **ACTION** — **CRM – create or update contact**
   Name, email, service wanted, source = 'Website'
4. **ACTION** — **Trello – create card**
   List 'Requests in', due in 1 working day, label by service
5. **ACTION** — **Gmail – send reply**
   Personal-sounding acknowledgement with booking link

2. New order → invoice or review request

Make One scenario handles every order. A router sends wholesale and retail orders down different paths.



Safeguards we built in

- Errors email the owner and pause the scenario – nothing fails silently
- Every run is logged in a Google Sheet for checking
- A person approves wholesale invoices over £1,000 before they are sent

3. Monthly report in one click (Google Apps Script)

Apps Script **Google Sheets** Runs on the 1st of each month. Excerpt of the script we wrote and documented:

```
// Monthly sales report — runs on the 1st at 7am (time-driven trigger).
// Totals last month's orders by channel, saves a PDF, leaves an email DRAFT.
function buildMonthlyReport() {
  const ss = SpreadsheetApp.getActive();
  const orders = ss.getSheetByName('Orders').getDataRange().getValues().slice(1);
  const now = new Date();
  const from = new Date(now.getFullYear(), now.getMonth() - 1, 1);
  const to = new Date(now.getFullYear(), now.getMonth(), 1);

  // Columns: 0 date, 1 order id, 2 channel, 3 total, 4 status
  const rows = orders.filter(r => r[0] >= from && r[0] < to && r[4] !== 'Refunded');
  const byChannel = {};
  rows.forEach(r => byChannel[r[2]] = (byChannel[r[2]] || 0) + Number(r[3]));
  const revenue = rows.reduce((s, r) => s + Number(r[3]), 0);

  // Write the summary to the 'Report' tab (charts there update automatically)
  const rep = ss.getSheetByName('Report');
  rep.getRange('B2:B4').setValues([[from], [rows.length], [revenue]]);
  rep.getRange(2, 4, Object.keys(byChannel).length, 2)
     .setValues(Object.entries(byChannel));
  SpreadsheetApp.flush();
  // Export the Report tab as a PDF into the shared Reports folder
  const url = ss.getUrl().replace(/edit.*$/, '') +
    'export?format=pdf&gid=' + rep.getSheetId() + '&portrait=false';
  const pdf = UrlFetchApp.fetch(url, {
    headers: { Authorization: 'Bearer ' + ScriptApp.getOAuthToken() }
  }).getBlob().setName('Sales report ' +
    Utilities.formatDate(from, 'Europe/London', 'MMMM yyyy') + '.pdf');
  DriveApp.getFolderById(REPORTS_FOLDER_ID).createFile(pdf);

  // Draft only — a person reviews before anything is sent
  GmailApp.createDraft(OWNER_EMAIL, 'Monthly sales report',
    'Hi Amani, last month\'s report is attached. Revenue: £' + revenue.toFixed(2),
    { attachments: [pdf] });
}
```

Result

3 hours → 4 minutes

The owner used to build this report by hand from three exports. Now it's waiting as a draft email on the 1st of every month.

What the client receives

- The working automation, in their own account
- A one-page guide: what it does, when it runs, how to pause it
- A map of every step (like the diagrams on page 1)
- A test log showing it was checked with real-looking data

Before and after (all three automations)

Task	Before	After
Enquiries logged and answered	4 h / month	15 min check
Wholesale invoicing	6 h / month	30 min approval
Monthly sales report	3 h / month	4 min
Review requests	Rarely sent	Every retail order

Our rule: automations prepare the work; a person checks anything that goes to a customer or moves money.

Fictional business and data. Zapier, Make, Xero and Google are trademarks of their owners; Bridge Imara is not affiliated with them. Automations are built in the client's own accounts and subscriptions.

AUTOMATION & INTEGRATIONS · REPORTING · SAMPLE DELIVERABLE

Sales and Operations Dashboard (Looker Studio)

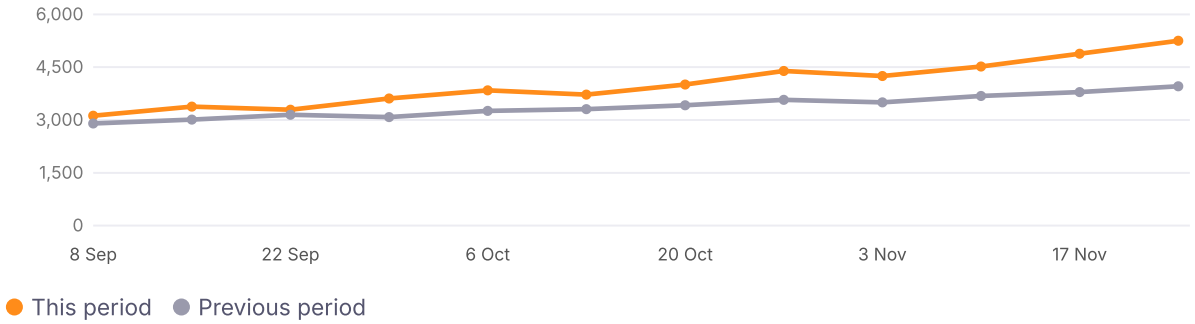
For: Kilima Home Goods (fictional) · Live dashboard, updated daily

SAMPLE · FICTIONAL DATA

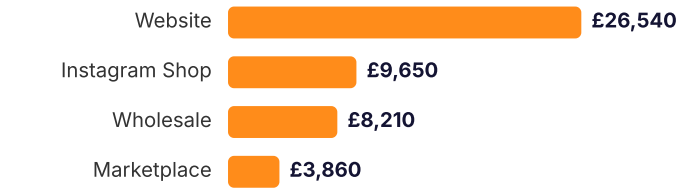
Date range: 8 Sep – 30 Nov 2026 (12 weeks) **Compared with:** previous 12 weeks **Data sources:** Google Sheets order log · Google Analytics 4 **Refreshes:** daily

Revenue	Orders	Average order	Repeat customers	Shipped on time
£48,260	1,214	£39.75	31%	96%
▲ 19.4% vs previous	▲ 14.2%	▲ 4.5%	▲ 5 pts	target 95%

Weekly revenue (£)



Revenue by channel (£)



Total £48,260

Top products

Product	Units	Revenue	vs prev.
Kikoy throw – ocean	214	£7,276	▲ 22%
Hand-woven basket, large	167	£6,513	▲ 9%
Soapstone candle holder (set)	248	£5,456	▲ 31%
Sisal table mats (4)	301	£4,515	▼ 3%
Recycled-glass tumblers (6)	122	£4,148	▲ 12%



Fulfilment

1,166 of 1,214 orders shipped within 2 working days. Late orders mostly in the week of 20 Oct (supplier delay).

Illustration of a Looker Studio dashboard we built for a fictional shop. Looker Studio is a Google product; Bridge Imara is not affiliated with Google. The client's dashboard lives in their own Google account.

ILLUSTRATIVE EXAMPLE · NOT A REAL CLIENT

Example Results: The First 90 Days

Maple & Moss Wellness Studio (fictional)

SAMPLE · FICTIONAL DATA

About this example: a made-up studio and made-up numbers, showing the kind of change a 90-day engagement aims for. Every business is different, and we agree goals and measures with you at the start.

Client: Maple & Moss Wellness Studio (fictional) – yoga and wellness studio, 3 instructors

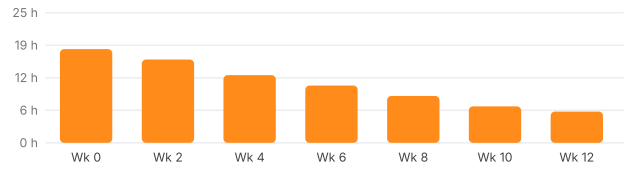
Services used: Virtual Assistant Support, Daily Operations, Systems & Processes, Automation

Hours used: 120 over 90 days

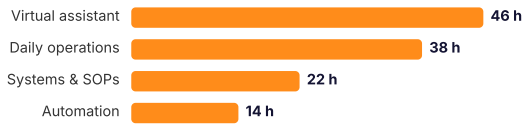
Before and after

Measure	Before (week 0)	After (week 12)	Change
Owner's time on admin each week	18 hours	6 hours	**12 hours back**
Reply time to new enquiries	26 hours	3 hours	**9× faster**
Class no-show rate	12%	7%	**−5 pts** (reminders)
Monthly sales report	3 hours by hand	10 minutes to check	**Automated**
Written processes (SOPs)	0	9	Studio runs without the owner
Overdue recurring tasks	Unknown	2 (tracked, chased)	**Visible**

Owner admin hours per week



Hours used by service



Total 120 hours: VA $25/h, Daily Ops $35/h, Systems $60/h, Automation $80/h.

What we did, month by month

Month 1 – take over the basics

- Inbox and bookings handed to a VA
- Operations tracker set up
- Class reminder messages started

Month 2 – write it down

- 9 SOPs: opening, closing, bookings, refunds, onboarding...
- Trello board for all requests
- Weekly Monday report in place

Month 3 – automate

- Enquiry → CRM → reply automation
- Monthly sales report in one click
- Handover pack: every login, process and contact