POP Studio

The team manual for the back office behind poplifeglobal.com.

Every person who raises a hand on the website lands here. This manual shows Tony, Teasha and the team how to work the list, answer fast, run events, send good news, and keep every relationship moving — in about ten minutes a day.



Tony & Teasha Pitts · POP Life Global

01 Start here & getting in
02 Your 10-minute daily routine
03 People & the contact card
04 Pipeline, stages & segments
05 Follow-ups & speed-to-lead
06 Events & QR doors
07 Broadcasts & welcome emails
08 Stories, orders & imports
09 Settings & launch day
10 Quick card & help

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BUILT & MAINTAINED BY THAT'S THE PLAN PRODUCTIONS

01 START HERE

One CRM behind every door on the site.

POP Studio is your private back office. It replaces GoHighLevel: no monthly seat fees, no outside logins, and everything comes straight to you.

What it does for you

Every form on poplifeglobal.com — book updates, speaking requests, the Connect page, event RSVPs, reservations, stories, QR codes — becomes **one clean record per person** in POP Studio. Within seconds the system thanks them by email, alerts the right owner, opens a reply task with a deadline, and starts the welcome emails.

Your job is the human part: **reply, log what happened, and move the relationship forward.** The system handles the reminders, the timing and the memory.

Getting in

1. **Open the address**
   `poplifeglobal.com/studio` once the domain is connected. Until then: `pop-life-global.base44.app/studio`
2. **Sign in with your invited email**
   Use the address the invite went to. Teasha: accept your invite first.
3. **Team members only**
   If you see "POP Studio is for the team," you're signed in with an address that isn't an admin yet. Ask Nathaniel to add it.
4. **Put it on your phone**
   Safari or Chrome → Share → **Add to Home Screen**. Works the same on phone, tablet and desktop.

WHO HAS ACCESS TODAY

✓ Tony Pitts — tonypittscompany@gmail.com

✓ That's The Plan (support) — info@

● Teasha Pitts — invite waiting to be accepted

Add more team members any time; each person gets their own login, and the timeline shows who logged what.

THE ONE RULE

Nothing gets deleted. People move to `Closed` — the history stays.

MOVING AROUND

The 12 tabs run across the top. On a phone, swipe the tab bar sideways. ← **Website** takes you back to the public site. Tap any name, anywhere, to open that person's card.

The 12 tabs at a glance

1 Today Your scoreboard and who to answer next.	**2 People** Everyone, searchable, filterable, exportable.	**3 Pipeline** Where each relationship stands, by stage.	**4 Tasks** Follow-ups with deadlines, by owner.
5 Events Wednesday nights, RSVPs and check-in.	**6 QR Doors** A QR code for every room, flyer and insert.	**7 Broadcasts** Good-news emails to a segment or everyone.	**8 Sequence** The welcome emails new people receive.
9 Stories Approve testimonials for the home page.	**10 Orders** Book reservations and orders.	**11 Import** Bring in old lists and sign-in sheets.	**12 Settings** Every email address and link, in one place.

02 DAILY ROUTINE

Ten minutes a day keeps every hand that went up answered.

Do this once a day — morning is best. The 8am digest email tells you if there's anything waiting before you even open Studio.

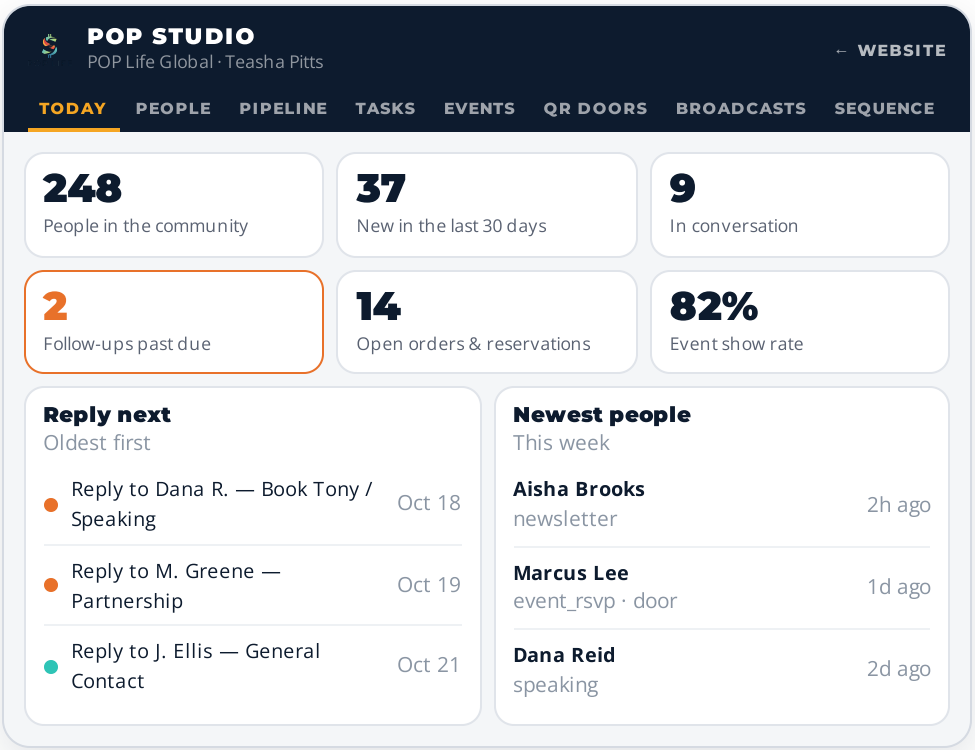


Illustration of the Today tab with example names. Every tile is a button — tap it to jump to that tab.

Your rhythm

EVERY DAY
Today tab • 10 min
Reply next, log notes, tick tasks.

EVERY MONDAY
Pipeline • 10 min
Move anyone whose stage changed. Close what's done.

AFTER EVERY EVENT
Stories • 5 min
Approve the testimonials from the thank-you email.

MONTHLY
Export People
Download a CSV backup; see how each segment is growing.

The routine, step by step

1 **Read the 8am digest**
"POP Life daily: 3 new, 1 overdue." It lands in the team inbox every morning there's something to see.

2 **Open Today**
Glance at the six tiles. An **orange** tile means follow-ups are past due — start there.

3 **Work "Reply next" top to bottom**
Oldest first. Tap a name to open their card and see exactly what they asked for.

4 **Reply the way that fits**
Tap their email or phone right on the card. Speaking and partnership requests deserve a personal reply within the day.

5 **Log it and tick it**
Save a one-line note ("Called — sending dates Friday"), tick the follow-up done, and move the stage if it changed.

6 **Check "Newest people"**
Fix a segment if the system guessed wrong, or add a follow-up for anyone worth a personal hello.

Who gets what? Every task and alert carries an owner — **Tony**, **Teasha** or **Team**. On the Tasks tab, pick your name in the top-right menu to see only yours.

03 PEOPLE

One record per person — with their whole story on it.

If someone fills out three forms, they're still one person. Every door they came through, every email and every note stacks on the same card.

Finding anyone

- **Search** by name, email, organization or tag.
- **Filter** by segment (e.g. "Event & speaking hosts") and by stage.
- **Export** downloads exactly what's filtered as a spreadsheet (CSV).
- The pill on the right is their stage; the time under it is the last time anything happened.

Working a contact card

1. **Read what they asked for**
   The Timeline (F) shows the form they sent, word for word.
2. **Reach out**
   Tap their email or phone (A).
3. **Log it**
   Type a short note and press **Save note**. Calls, texts and coffees count too.
4. **Set the next step**
   Add a follow-up (E) — it's due in two days and shows on Today.
5. **Move the stage**
   Change Stage (C) when the relationship moves. The change is logged automatically.

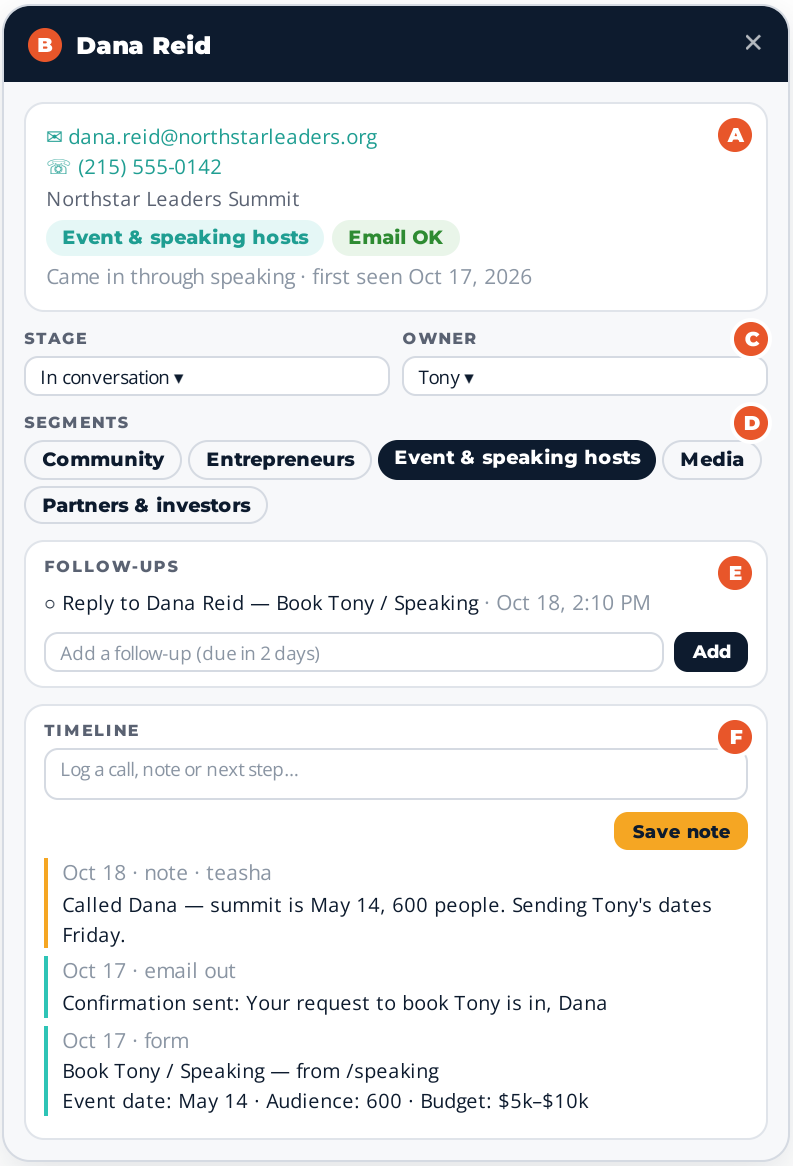


Illustration of a contact card with example details. **B** is their name — tap ✕ or anywhere outside the card to close it.

OWNER

Tony, Teasha or Team. It decides whose name is on new follow-ups for this person.

SEGMENTS

Tap to turn on or off. Segments decide who receives which broadcast — keep them honest.

EMAIL OK

Green means they agreed to emails. "Unsubscribed" in red means never email them again — the system enforces it.

04 PIPELINE

Where every relationship stands.

The Pipeline tab shows one column per stage. Use the menu on any card to move someone. On a phone, swipe the columns sideways.

The eight stages

New	Just came in through a door. Nothing has happened yet.	AUTOMATIC
Nurturing	Receiving the welcome emails. Moves here on its own after the first one.	AUTOMATIC
Engaged	Took a real step — RSVP'd, shared a story, replied.	AUTO + YOU
Attended	Checked in at an event. Set the moment you tap Check in.	AUTOMATIC
In conversation	A live talk: speaking, partnership, Love & Business, media.	AUTO + YOU
Proposal / Order	Dates, pricing or an order is on the table.	YOU
Won	Booked, signed, bought, partnered. Celebrate it.	YOU
Closed	Not now. History stays; they still get good news if subscribed.	YOU

Every stage change writes a line on the person's timeline, so anyone on the team can see what happened and when.

The ten segments

SEGMENT	WHO THEY ARE
Community	General opt-ins, QR scans, RSVPs
Entrepreneurs	Building a business
Real estate investors	POP House & investing
Luxury clients	High-touch services
Partners & investors	Partnership, programs, POP Houses
Event & speaking hosts	Want Tony on their stage
Media	Press, podcasts, interviews
Foundation donors	POP Life Foundation support
Love & Business	Couples building together
Book buyers	Reserved, ordered or bulk

A person can sit in several segments. The door they came through sets the first one.

YOUR STORY, IN NUMBERS

Segments are your avatars. Stages are your narrative.

Filter People by a segment and a stage and you can answer the questions that matter: *How many speaking hosts are in conversation? How many book buyers came from events?* Export it and you have the report.

05 FOLLOW-UPS

Speed-to-lead: nobody who raised a hand gets forgotten.

High-intent doors open a reply task automatically, with a deadline and an owner. Your job is to clear the list.

Reply windows the system sets for you

WHEN SOMEONE…	TASK DUE IN	OWNER	PRIORITY
Sends a media request	4 hours	Tony	Priority
Asks to book Tony to speak	24 hours	Tony	Priority
Asks about partnership, programs or POP Houses	24 hours	Tony	Priority
Reserves or orders the book	24 hours	Team	Priority
Asks about Love & Business	24 hours	Teasha	Normal
Requests a bulk book order	24 hours	Team	Normal
Asks about the Foundation	48 hours	Tony	Normal
Sends a general message or shop question	48 hours	Team	Normal
Shares a story	72 hours	Team	Normal
Joins the list, RSVPs or scans a QR code	No task — the welcome emails and event reminders take care of them.		

Per Tony (Oct 2026), the alert emails for Tony's doors currently go to Teasha. Owners can be changed on any card.

READING THE TASKS TAB

- Teal dot / grey date — on time.
- Orange "Past due" — answer this first.
- Priority — speaking, media, partnership and orders.
- Tap the **circle** to mark it done. Tap the **title** to open the person.
- The menu top-right filters to **Tony**, **Teasha** or **Team**.

MAKING YOUR OWN FOLLOW-UPS

Open anyone's card → **Follow-ups** → type the next step → **Add**. It's due in two days, carries the person's owner, and shows on Today until you tick it.

WHAT "DONE" MEANS

You've personally replied, and you've logged a note saying what you said and what happens next. Then tick the circle.

"The first reply wins the relationship." — the reason the deadlines exist. A same-day reply to a speaking or partnership request is the single biggest lever in this system.

06 EVENTS & QR DOORS

Fill the room, check people in, and let the follow-up send itself.

Wednesday networking nights, launches and workshops all run from the Events tab. QR doors turn every flyer, stage and book insert into a signup.

Run an event

1. **New event**
   It pre-fills the next Wednesday, 6:30–9:00 PM. Add venue, address, capacity (0 = no limit) and a description.
2. **Set Status to "Open"**
   Only Open events appear on the website's Events page and take RSVPs. Draft = hidden.
3. **Make a QR door for it**
   On QR Doors, pick the event under "RSVP to event" — scanning it RSVPs them in one tap.
4. **At the door: Check-in list**
   Tap **Check in** beside each name. They move to **Attended** automatically.
5. **That's it**
   The reminders and the next-morning thank-you go out on their own. Export the list if you need it.

What sends itself

ON RSVP	"You're in" confirmation with date, time and place.
DAY BEFORE	"Tomorrow: …" reminder to everyone registered.
SAME DAY	"Today: …" a few hours before doors open.
NEXT MORNING	Came: a thank-you plus a link to share their story. Didn't come: "We missed you" with the next dates. The event then moves to Past.

All times are Eastern. Follow-ups only go out between 9am and 8pm.

QR doors — a signup in every room

Each QR door has its own short link (`poplifeglobal.com/j/kimmel`) and its own one-tap signup page with your headline and offer. Everyone who signs up lands in People, tagged with where they came from — so you'll know which stage, flyer or book insert actually works.

- **Name** — for you ("Kimmel Center keynote"). **Short code** — the end of the link.
- **Where it lives** — event, book, print, social, partner. **Segment** — who these signups are.
- **Headline, subline, offer** — what they see after scanning.
- **Download PNG** — drop it on slides, flyers, table tents and the book insert.

EVERY QR DOOR SHOWS

event · 412 scans · 96 signups

Scans vs. signups tells you which rooms and placements convert.

07 EMAIL

Good news, not sales.

Broadcasts are one-time emails you send. The Sequence is the set of welcome emails every new subscriber receives automatically.

Send a broadcast

1. **New broadcast → start from a template**
   "The book is out", "Community good news" or "Wednesday night invite" — or write your own.
2. **Pick the audience**
   Everyone, or one or more segments. Optionally only one stage. The count updates live: "212 people will receive this."
3. **Write the subject and message**
   Keep it short and warm. Use the formatting in the box below.
4. **Send me a test**
   Always. Read it on your phone before anyone else does.
5. **Send now**
   Confirm, and it goes. Each person's timeline records it. Saved drafts stay in the list until sent.

FORMATTING THAT WORKS IN EVERY EMAIL

YOU TYPE	THEY SEE
`{{first_name}}`	Their first name ("Hi Dana,")
`{{site_url}}`	Your website address
`[Get your copy]({{site_url}}/book)`	A gold button that links to the Book page
A blank line	A new paragraph

THE WELCOME SEQUENCE

Everyone who says yes to email gets these, in order, between 9am and 8pm Eastern.

1. **The story behind POP Life**
   Day 2 · links to Our Story
2. **Learn It. Build It. Live It.**
   Day 7 · the programs
3. **There's music inside the pages**
   Day 14 · the book & soundtrack
4. **Let's build what's possible together**
   Day 21 · invitation to connect

Edit any email's words on the **Sequence** tab. Untick **Active** to pause one. **Add email** puts a new one at the end.

WHO RECEIVES EMAIL

- Only people marked **Email OK**.
- Unsubscribes are honored automatically — every email carries the link.
- Confirmations go out at most once a day per person (RSVPs and orders always).

Three templates, ready to go

THE BOOK IS OUT

It's here, {{first_name}}: POP! The Power of Partnerships

Launch day. Audience: Everyone. Gold button to the Book page.

COMMUNITY GOOD NEWS

Our community is growing, {{first_name}}

Monthly. Fill in three bullets of what you're building together.

WEDNESDAY NIGHT INVITE

Save your seat for Wednesday, {{first_name}}

Before each networking night. Button to the Events page.

08 STORIES, ORDERS & IMPORTS

Proof, buyers and every old list — all in one place.

Three tabs that turn the community into reputation, revenue and reach.

STORIES

Testimonials for the home page

Stories arrive from the Share page and from the thank-you email after every event.

- **Waiting** — new stories to review.
- **Show on site** publishes it to the home page automatically.
- **Hide** keeps it private.
- If the person did **not** give permission, the button is locked — the system protects them.

ORDERS

Reservations & orders

Every Reserve or Order request from the Book page. On launch day this is your warm first-buyer list.

reserved → invoiced → paid → fulfilled

Change the status with the colored menu on each order. **Export** gives you the full list with addresses.

IMPORT

Bring in every old list

- Export the list as **CSV** (Google Sheets: File → Download → CSV).
- **Choose file**. Columns match themselves; fix any that guessed wrong.
- Pick a **segment** and a **tag** (e.g. `kimmel-2026`).
- Tick consent **only** if they agreed to hear from you. Then optionally start the welcome emails.
- **Import**. Duplicates merge into the existing person.

Consent is not optional. Only tick "These people agreed to hear from POP Life by email" for people who signed up, bought or attended. Emailing a cold list hurts your sender reputation — and that reputation is what gets the book announcement into inboxes on launch day.

Your subscriber Google Sheet

The list you've been collecting in Google Forms and Sheets comes into POP Studio through **Import**: download the Sheet as CSV, import it with the segment **Community** and the tag `google-form`, and tick consent (they signed up). From then on, the website's own forms replace the Google Form — every new signup lands in POP Studio with the full flow behind it.

ONCE IT'S IN

Filter People by the tag `google-form` to see the group, and send them a "Welcome to the new home of POP Life" broadcast.

Order statuses, in plain words

reserved — They asked for a copy. Nothing charged yet.

invoiced — You've sent the total and how to pay.

paid — Payment received. Ready to ship or hand over.

fulfilled — Shipped, picked up or signed at an event.

cancelled — They changed their mind. History stays.

09 SETTINGS & LAUNCH DAY

Change it once, it changes everywhere.

Every email address and link the website and emails use lives on the Settings tab. Edit the field, press **Save changes**, done.

GROUP	SETTING	WHAT IT CONTROLS
Email	Public email	Shown on the site; the reply-to address on every email.
	Alert addresses (Tony / Teasha / Team)	Where new-inquiry alerts and the 8am digest go. All set to Teasha@POPLifeGlobal.com today.
	Also copy every alert to	That's The Plan's oversight copy. Comma-separate to add more people.
Site	Live site address	The address used in every email link — https://poplifeglobal.com.
	Donate link · Booking calendar link	Foundation donate button; optional calendar for booking calls.
Book	Book status	`prelaunch` = Reserve buttons and the book-updates list. `live` = Buy buttons.
	Buy links (hardcover, signed, paperback, eBook, audiobook, bundle)	When the book is live and a link is filled in, that button goes straight to the store.
Social	Tony's and Teasha's profiles, Instagram DM link	The icons in the footer, Our Story and the Connect page.

"Shown on the public site" under a field means visitors can see it. "Last email delivery problem" is read-only — it tells support if an email bounced.

PLAYBOOK

Book launch day in five moves

Everyone who reserved or joined the book list has been waiting for this email.

1. **Paste the buy links**
   Settings → Book → each format you're selling.
2. **Flip Book status to live**
   Type `live` and save. Every Reserve becomes Buy, site-wide.
3. **Send "The book is out"**
   Broadcasts → template → audience: Everyone → test → send.
4. **Call the reservations**
   Orders → Export. These are your first buyers; a personal note converts.
5. **Put the QR on everything**
   A "book" QR door for the insert, the stage and the signing table.

10 QUICK CARD

Keep this one handy.

The whole manual on one page, plus the answers to the questions people ask first.

DO

- Open **Today** every morning and clear **Reply next**.
- Log a one-line note after every call, text or coffee.
- Move the stage the moment a relationship moves.
- Send yourself a test before every broadcast.
- Make a QR door for every event, flyer and stage.
- Approve stories after every event.
- Export People once a month as a backup.

SKIP

- Deleting people — move them to **Closed** instead.
- Importing anyone who didn't agree to hear from you.
- Sales blasts. Share good news; the offer rides along.
- Replying from memory — read the timeline first.
- Sharing your login. Ask for a team invite instead.
- Changing Settings you're unsure about — ask first.

Questions people ask first

Someone says they never got the confirmation.

Check their timeline for "Confirmation sent". If it's missing, reply personally — and tell support so we can check delivery.

How do I stop emails to one person?

They can use the unsubscribe link in any email. If they ask you directly, tell support and we'll mark them unsubscribed.

Can I use it on my phone?

Yes — everything works on a phone. Add it to your home screen for one-tap access.

The same person shows up twice.

They used two different email addresses. Keep the active one, note the other on the timeline, and close the duplicate.

An event isn't showing on the site.

Its Status must be **Open**. Draft, Closed and Past events stay hidden.

I see "POP Studio is for the team."

You're signed in with an address that isn't on the team yet. Ask Nathaniel to invite it.

Your links

The website	POP Studio	Website guide	Your POP Life Kit
poplifeglobal.com	poplifeglobal.com/studio	poplifeglobal.com/guide	Drive → POP Life Kit

Until the domain is connected, use pop-life-global.base44.app in place of poplifeglobal.com.

HELP & SUPPORT

Nathaniel Pyfrom · That's The Plan Productions

nathaniel@thatstheplan.co · Read the companion manual, **Form, Function & Flow**, to see exactly what happens behind every form.