

From application to the next level

BUSINESS	A sailing school running RYA courses, theory and practice, for adults from 17. Five places per course. Oksana Khaidenko, who wrote this blueprint, built the school's system and works with the school.
CONTENTS	The short version for the owner (page 2), process map and where it breaks (3–10), detailed blueprint for whoever builds it (11–12), roadmap (13), what the school runs now (14).
PROCESS	One student, from the application on the website to the offer of the next level, plus what the owner sees of it.
STATE	Before the school had its own system: an inbox, participant sheets, a separate finance sheet and personal messengers.
EVIDENCE	A walkthrough by the person who runs operations (the only part required) and the school's written case notes. Lines marked "Derived" are conclusions drawn from the steps.

12

steps

6

lanes

7

stages

21

places where it breaks

HOW TO READ THIS MAP

7 A step, in the lane of whoever does it. "→ Student" shows who it goes to; the grey line shows where it happens.

4 A step where the process breaks hardest.

MANUAL COPY Data typed or copied by hand.

MEMORY Works only if someone remembers or checks.

TWO PLACES The same thing kept in more than one place.

RISK A mistake or a loss the process allows.

IN THE SYSTEM What the school's own system does now.

Three breaks that cost the most, and what to do with each tool

1. The last place gets paid for twice

Week 2 · B2 B4

Payment instructions go out instantly and a place is taken on payment. Several people can pay for the last of five places before anyone closes the date.

CHANGES TO A place is held for 3 days; the site closes a full date itself and opens a waiting list.

2. Graduates are never offered the next level

Week 5 · F1 F2 F4

Nobody records who completed which level, so the school cannot invite Competent Crew graduates to practice, or skippers to refresher courses.

CHANGES TO Mailing segments by level completed, cancelled or theory only.

3. Money lives apart from the booking

Week 3 · C1 C3 C4

Parts, deposits, discounts and payments from other people go into a separate finance sheet. Nobody sees who is late.

CHANGES TO Payments and discounts on the booking; late deposits raise an alert.

What is at stake

Not sized here: the school keeps its numbers private. In your blueprint: graduates a year × the share who never take the next level × the price of that level, plus refunds for places paid twice.

If you build nothing

You still know which three breaks cost most, what to do with each tool, and you hold a specification any builder can quote on.

What it took

A walkthrough of one real student by the person who runs operations. Nothing else was required.

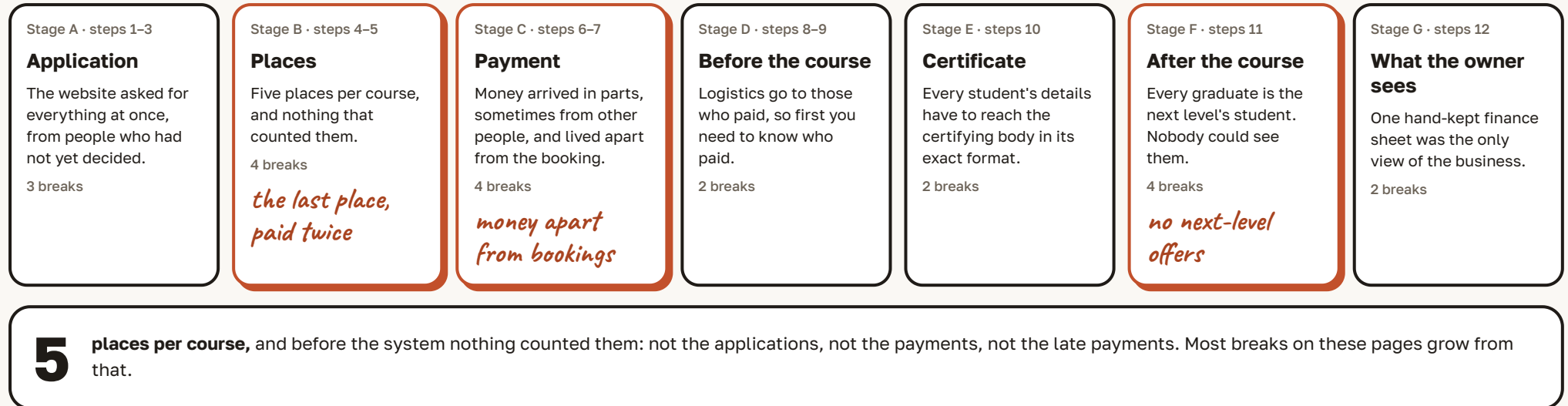
Your tools: keep, simplify or replace

TOOL	DECISION	WHY	STATUS
Website application form	Simplify	Short form first; the full application moves into the student's account, after payment.	BUILT
Shared inbox	Replace	Applications land in the system as bookings, not as emails to retype.	DONE
Participant sheets	Replace	Each course date holds its own bookings and places.	DONE
Finance sheet	Replace	Payments, parts and discounts are recorded on the booking.	DONE
Personal messengers	Keep	Conversations stay where students are; what is agreed goes into the system.	BUILT

OVERVIEW

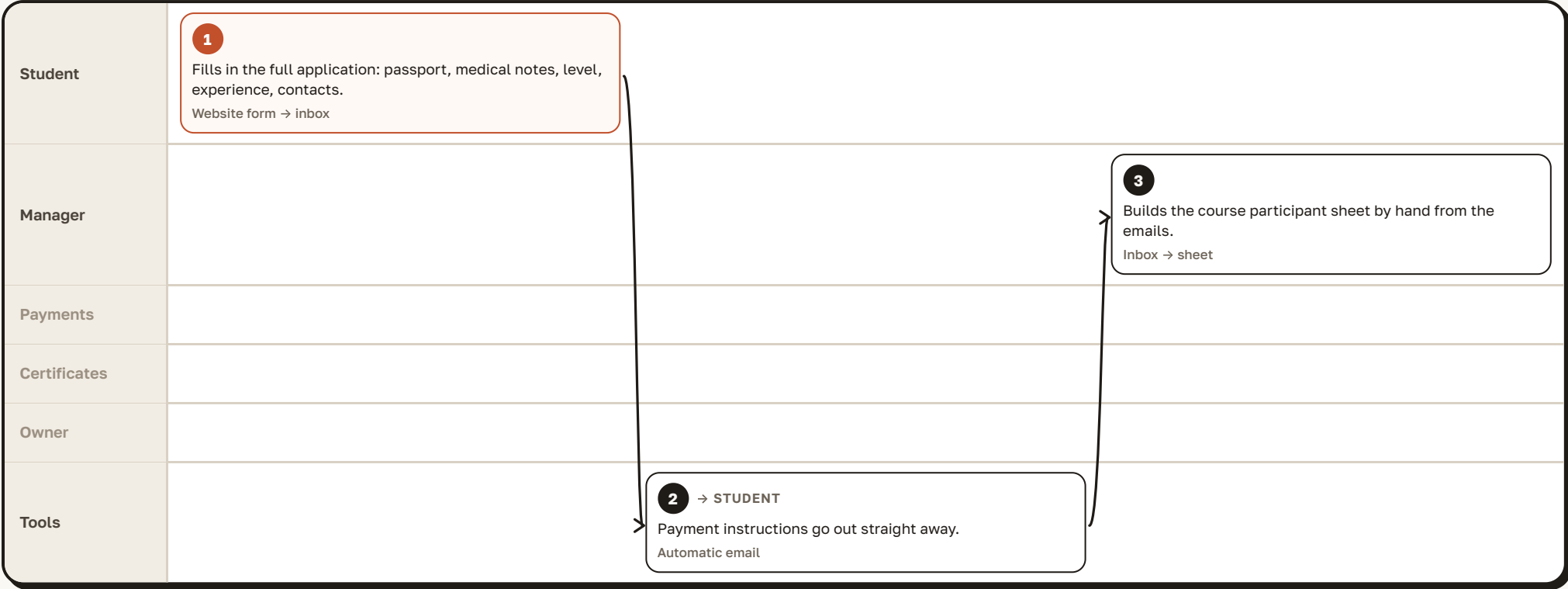
Seven stages, one thread

Each stage has a page of its own. The marked stages hold the breaks that cost the school most.



Application

The website asked for everything at once, from people who had not yet decided.

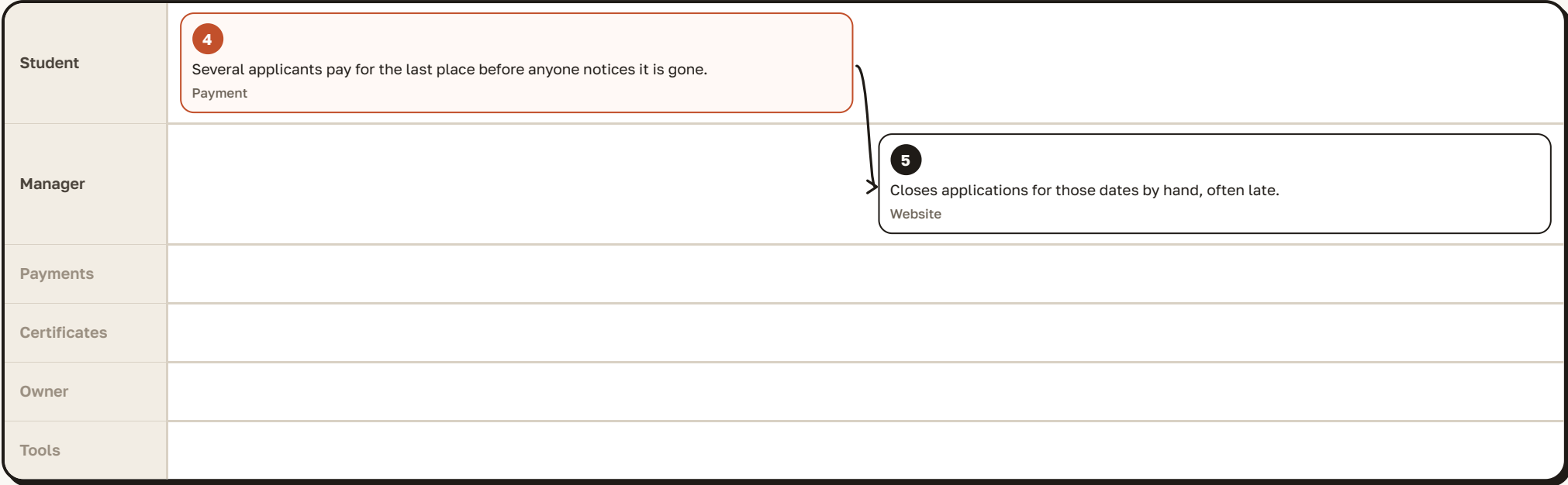


	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
A1	RISK	The form was built for someone who had already decided. A cold visitor leaves without leaving even a contact.	1	Operations walkthrough
A2	RISK	Passport and medical details are collected before anyone has decided or paid.	1	Derived from step 1
A3	MANUAL COPY	Every participant sheet is retyped from emails.	3	Operations walkthrough

IN THE SYSTEM A short form with name and contact. The system opens a personal account; the full application is filled in there after payment, before the course. If it is missing, both the student and the manager see a warning.

Places

Five places per course, and nothing that counted them.

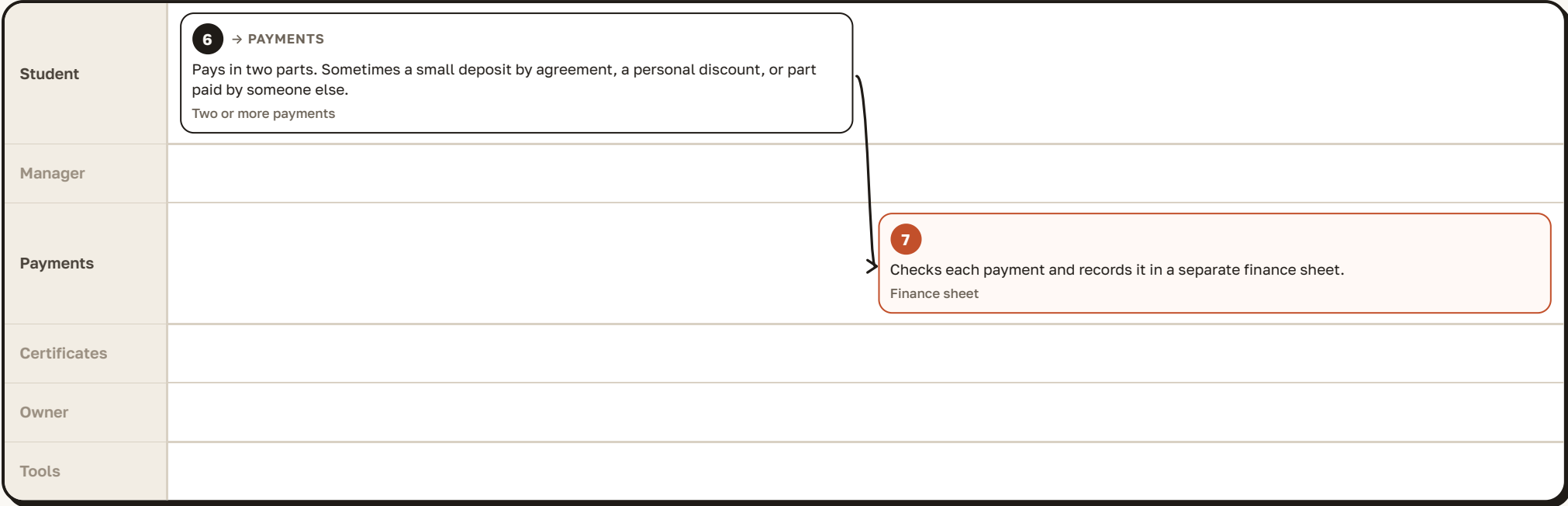


	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
B1	MEMORY	Nobody counts applications, payments and late payments per course date.	4-5	Operations walkthrough
B2	RISK	Payment instructions go out instantly and a place is taken on payment, so the last place can be paid for twice.	4	Operations walkthrough
B3	RISK	There is no waiting list. People turned away are simply lost.	5	Operations walkthrough
B4	MANUAL COPY	Applications are closed by hand, often after the course is already full.	5	Operations walkthrough

IN THE SYSTEM A place is held for 3 days after applying. The site closes the date itself when it is full, shows "2 places left", and switches the page to a waiting list.

Payment

Money arrived in parts, sometimes from other people, and lived apart from the booking.

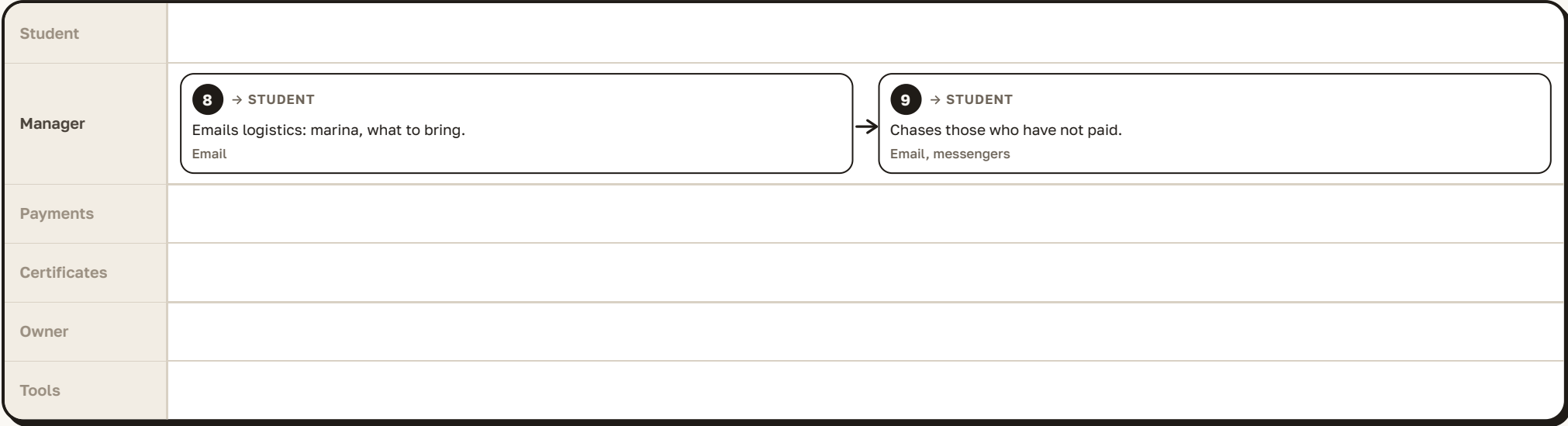


	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
C1	TWO PLACES	Payments live in a finance sheet that is not linked to the booking.	7	Operations walkthrough; Written case notes
C2	MEMORY	Deposits and personal discounts are agreed in conversation and are not on the booking.	6	Derived from step 6
C3	RISK	When someone else pays, or money comes from several accounts, matching it to the student is guesswork.	6-7	Operations walkthrough; Written case notes
C4	MEMORY	Nobody can see who is late with a payment.	7	Operations walkthrough

IN THE SYSTEM Each payment is checked by a person and recorded on the booking. A personal discount has its own field and the deposit and balance are calculated with it. No deposit after 3 days: the manager and admin get an alert and it appears on the dashboard.

Before the course

Logistics go to those who paid, so first you need to know who paid.



	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
D1	MANUAL COPY	Who gets the logistics is decided by checking the separate finance sheet.	8	Derived from steps 7–8
D2	MANUAL COPY	Reminders to those who have not paid are written by hand.	9	Operations walkthrough

IN THE SYSTEM The logistics mailing knows each student's payment status and adds a balance reminder for those who only paid the deposit.

Certificate

Every student's details have to reach the certifying body in its exact format.

Student	
Manager	
Payments	
Certificates	10 Compiles every student's details to the certifying body's standard, by hand. Email
Owner	
Tools	

	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
E1	MANUAL COPY	Certificate data is compiled and sent by hand for every course.	10	Operations walkthrough
E2	RISK	A typo made here ends up on someone's certificate.	10	Derived from step 10

IN THE SYSTEM The certificate sheet is generated from the applications automatically, with restricted access.

After the course

Every graduate is the next level's student. Nobody could see them.

Student	
Manager	11 Nobody tracks levels completed, cancellations or theory-only students. Next levels are not offered. —
Payments	
Certificates	
Owner	
Tools	

	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
F1	MEMORY	Nobody records who has completed Competent Crew, the skipper course or other levels.	11	Operations walkthrough
F2	RISK	Graduates are not offered the next level, refresher training or extra certificates.	11	Operations walkthrough
F3	RISK	People who applied and cancelled are not recorded.	11	Operations walkthrough
F4	MEMORY	Students who did the theory but not the practice are invisible.	11	Operations walkthrough

IN THE SYSTEM Segments in the mailing module: not completed or cancelled → new dates; first level only → practice; skipper certificate → refresher and extra courses.

What the owner sees

One hand-kept finance sheet was the only view of the business.

Student	
Manager	
Payments	
Certificates	
Owner	12 Sees only the finance sheet kept by hand. Finance sheet
Tools	

	TYPE	WHERE IT BREAKS	STEPS	EVIDENCE
G1	TWO PLACES	The owner sees only a hand-kept finance sheet. Working the funnel is impossible.	12	Operations walkthrough
G2	TWO PLACES	Conversations happen in staff’s personal messengers.	—	Operations walkthrough

IN THE SYSTEM A dashboard of operational tasks: overdue deposits, overdue balances, logistics not yet sent. Conversations stay in messengers; what was agreed is recorded in the system.

What the system holds

Every element here is **Built**: the school runs it now. The "Closes" column points to the breaks on pages 4–10.

Records

	ELEMENT	WHAT IT IS	CLOSES	STATUS
R1	Student	Contacts, personal account, full application, levels completed, theory and practice done.	A2 A3 F1 F4	BUILT Operations walkthrough
R2	Booking	Course date, status, each payment and payer, personal discount, deposit and balance due.	C1 C2 C3	BUILT Operations walkthrough; case notes
R3	Course date	Five places, applications, held places, paid places; open, full or waiting list.	B1 B2	BUILT Operations walkthrough
R4	Waiting list	Short form on a full date; the list per date for the manager.	B3	BUILT Operations walkthrough

Statuses and rules

	ELEMENT	WHAT IT IS	CLOSES	STATUS
S1	Booking status	Applied (place held 3 days) → Deposit paid → Paid in full → Completed · Cancelled · Released.	B1 F3	BUILT Operations walkthrough
G1	Held place	A place counts as taken if it is paid, or applied for less than 3 days ago.	B2	BUILT Operations walkthrough
G2	Full date	When all places are taken the site closes the date itself and shows places left before that.	B2 B4	BUILT Operations walkthrough
G3	Discount	The deposit and balance are calculated with the personal discount on the booking.	C2	BUILT Operations walkthrough
G4	Agreements	Conversations stay in messengers; discount, payment and place agreements are recorded on the booking.	G2	BUILT Operations walkthrough

What the system does, and what stays with people

What the system does on its own

	WHEN	WHAT HAPPENS	FOR	CLOSES	STATUS
T1	Someone sends the short form	A personal account and a booking are created	Student	A1	BUILT Operations walkthrough
T2	No deposit 3 days after applying	Alert to manager and admin; listed on the dashboard	Manager	B1 C4	BUILT Operations walkthrough
T3	Logistics mailing before a course	Content follows payment status; deposit-only students get a balance reminder	Student	D1 D2	BUILT Operations walkthrough
T4	Full application missing before the course	Warning in the student's account and for the manager	Student, manager	A2	BUILT Operations walkthrough
T5	Applications for a course	Certificate sheet built automatically, restricted access	Certificates	E1 E2	BUILT Operations walkthrough

Views

	VIEW	SHOWS	FOR	CLOSES	STATUS
V1	Operations dashboard	Overdue deposits, overdue balances, logistics not yet sent	Owner, manager	G1 C4	BUILT Operations walkthrough
V2	Mailing segments	Not completed or cancelled · first level only · skipper certificate	Manager	F2 F3 F4	BUILT Operations walkthrough

Stays with people, on purpose

- Confirming a payment that hasn't shown up: it may be delayed, or the student has a question.
- Releasing a booking when the student doesn't answer or cancels.
- Offering a freed place from the waiting list. Order can follow personal agreements, such as someone who has tried to get on this course several times.
- Conversations in messengers.

Five weeks, places first

Records come first because everything reads from them. Places come next because a place paid twice is the costliest mistake. Payments follow, then everything that depends on knowing who paid. An estimate for a project of this size.

WEEK 1

Records and migration

R1–R3, data moved from the inbox, participant sheets and finance sheet

DONE WHEN

Every booking for upcoming dates is in the system. The sheets are closed.

WEEK 2

Places and waiting list

S1, G1, G2, R4, T1

DONE WHEN

A test date fills up and closes itself; the page turns into a waiting list.

WEEK 3

Payments

G3, G4, T2, V1

DONE WHEN

A late deposit shows up on the dashboard without anyone checking a sheet.

WEEK 4

Before the course and certificates

T3, T4, T5

DONE WHEN

One mailing reaches everyone with the right payment reminder; the certificate sheet builds itself.

WEEK 5

Next levels and handover

V2, guide, short videos

DONE WHEN

A segment of first-level graduates gets the practice dates. The team runs one real course in the system.

Price and dates

In a real blueprint, a fixed price and start date go here. Implementation starts from €3,500 and typically takes 4–8 weeks.

Yours to keep

The blueprint is yours. Build it with me, with your team, or with anyone else.

PROOF

What the school runs now

Everything in this blueprint is in use. The school's system was built by the author of this sample.

BEFORE

Several people could pay for the last of five places.

IN THE SYSTEM

A place is held 3 days; a full date closes itself and opens a waiting list.

BEFORE

Payments, parts and discounts lived in a separate finance sheet.

IN THE SYSTEM

Each payment and discount sits on the booking; late deposits raise an alert.

BEFORE

Nobody knew who had completed which level.

IN THE SYSTEM

Mailing segments invite each graduate to the next step.

BEFORE

The owner saw one hand-kept sheet.

IN THE SYSTEM

A dashboard of overdue payments and unsent logistics.

your process next

Your blueprint is made the same way: you show one real case, I map every step and mark where it breaks, you confirm the map, and you get the system blueprint and a roadmap with a fixed price. Five working days.