



Case Study: Streamlining Operations for The Work Optional Method

Date: July 2026

Client Name: Scott Lask, The Work Optional Method

Industry: Financial Coaching

Scott Lask, a dedicated financial coach, specializes in guiding clients through understanding the stock market and making informed financial decisions based on changes in the market. While Scott has a wealth of knowledge and expertise, he faced significant challenges in operational efficiency. His systems were in place but underutilized, resulting in missed opportunities and compliance concerns.

Challenges Faced

Scott had invested in a white label version of Go High Level ("GHL") all-in-one CRM to centralize his client management but had never leveraged it effectively. His reliance on manual email blasts through Outlook not only jeopardized compliance but also hampered his ability to streamline his processes. With a growing clientele and increasing workshop attendance, Scott needed comprehensive support to get his systems up and running efficiently.

Solution Implemented

Recognizing the urgency of Scott's situation, Jenn Mullen from Beachcomber Business Solutions stepped in to transform his approach to client management and communication.

1. CRM Setup and Client Import:
 - a. We began by thoroughly assessing Scott's existing systems. Jenn set up the GHL CRM, ensuring it was tailored to his business needs.
 - b. Scott's database was imported into the CRM, allowing for organized tracking and segmentation.
2. Tagging and Automation:
 - a. Jenn implemented a tagging system for his contacts, making it easier for Scott to manage relationships.
 - b. Automations were built to send personalized communications upon purchase, ensuring clients received timely updates and engagement.
3. Email Marketing Templates:
 - a. To enhance Scott's outreach, Jenn created a series of email templates for his subscriptions, making compliance straightforward and efficient.



4. Training and Support:
 - a. To empower Scott and ensure he could effectively use the CRM on his own, Jenn produced how-to videos demonstrating key functionalities and processes.
5. Managing Workshops:
 - a. For Scott's workshops, Jenn took charge of the Eventbrite setup, managing registrations, and ensuring a seamless experience for attendees.
 - b. Jenn actively monitored questions raised before the events, moderated discussions during the workshops, and communicated with attendees post-event to maintain engagement.

Results Achieved

The partnership with Beachcomber Business Solutions has transformed Scott's operational landscape and, in his words, brought him into the 21st century. Here's what we achieved:

- Fully Functional CRM: Scott now utilizes the GHL CRM to efficiently manage his contacts, streamline communications, and uphold compliance standards.
- Automated Engagement: The newly established automations and email campaigns have significantly improved client communications and workshop engagement.
- Enhanced Workshop Management: The structured approach to managing workshops has led to better participant experiences, higher attendance rates, and more focused interactions.
- Ongoing Collaboration: Scott and Jenn have established a continuous partnership, enabling them to adapt and refine processes as his business grows.

Conclusion

By implementing strategic operations tailored to Scott's unique needs, Beachcomber Business Solutions has helped The Work Optional Method reach new heights in efficiency and compliance. The results speak volumes: Scott is now empowered to focus on what he does best—coaching clients towards a work optional life—while relying on a robust operational backbone to support his expanding business.

For more information on how Beachcomber Business Solutions can streamline your business operations, please visit www.beachcomberbusinesssolutions.com.