



FINCA — Execution OS Pack

The bridge from strategy to "the team can run this every week." Working templates, not polished docs. Copy each section into your tools (Airtable / Notion / Docs) and fill.

EXECUTION OS PACK

INTERNAL · CONFIDENTIAL

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Companion: FINCA_90Day_Operating_Dashboard.md (Component 1 — the weekly page).

Contents: 2) CRM schema · 3) Room Quality Rubric · 4) Member Journey Map · 5) Host Briefing Pack · 6) Partner Onboarding Pack · 7) Post-Event Recap · 8) Founder Sales Script · 9) First 100 Manifesto · 10) Language Bank · 11) Local Respect Checklist · 12) Revenue Decision Tree · 13) One City, One Page · 14) Proof Library · 15) Decision Log.

2. CRM schema (the quiet moat — build in Airtable/Notion)

MEMBERS / ATTENDEES — name · email · WhatsApp · city stage (new / relocating / lives here / visiting) · neighbourhood · nationality/languages · intent (friends / network / culture / wellness / soft-landing / impact) · social comfort (alone-ok / prefers host intro / small groups / quieter) · source · arrival style archetype · date joined · rooms attended (count + list) · **arrived alone? (per room)** · **second-visit? (Y/N + days)** · people met · intros requested / accepted · places saved · partner redemptions · circle(s) · Passport status · **Regular? (Y/N + date)** · consent flags (visibility, photo) · notes.

ROOMS / EVENTS — name · format · date · venue/partner · host · capacity · RSVPs · attended · first-timers · returning · arrived-alone · intros made · revenue · F&B/venue cost · sponsorship · net margin · room-quality score (Component 3) · local:newcomer ratio · testimonials captured · next-room bookings.

PARTNERS — name · category · neighbourhood · contact · tier (Listed→Anchor) · perk offered · pilot start/end · member visits · redemptions · repeat visits · bookings · events hosted · member-loved score · renewal/upgrade intent · status.

HOSTS — name · founder/non-founder · rooms run · avg room-quality score · avg second-visit return · intros made · safety incidents · trained? · ready to run solo? (Proof #2).

INTROS — from · to · reason · type · host-made? · status (requested/accepted/declined) · outcome (met? reconnected?).

Consent rule: capture only with explicit opt-in; every member can see, edit, delete. (See the Finca Data Promise in the master plan §24.14.)

3. Room Quality Rubric (score every room 1-5)

Dimension	1	3	5
Arrival experience	confusing / cold	fine	warm, expected, effortless
Solo-arrival comfort	left alone	greeted	actively introduced
Host warmth	absent	present	sets the whole tone
Quality of introductions	none	a few	intentional, well-matched

Dimension	1	3	5
Local / newcomer balance	~all expat	skewed	genuine mix
Room energy	flat	good	alive, people stay
Partner / venue fit	wrong room	ok	elevates the night
Conversation depth	small talk	some real	real connection
Follow-up strength	none	recap sent	recap + intros + next invite
Likelihood of return	low	maybe	"when's the next one?"

A "good room" = avg ≥ 4 with no dimension at 1-2. Score within 24h while it's fresh. Trend the average week over week.

4. Member Journey Map (first 60 days — align product, marketing, ops)

- **Day 0** — joins waitlist (intake captures stage, intent, comfort).
- **Day 1-3** — welcome + light city orientation ("First 72 Hours"); arrival-style archetype returned.
- **Week 1** — invited to first room; Come Alone option surfaced.
- **After room 1** — recap within 24h: people met · save the venue · next-room rec · one warm intro offered.
- **Week 2-4** — second room *or* a trusted-place / partner action (the return signal that matters).
- **Week 4-6** — becomes a familiar face; reconnections; Passport progress.
- **Week 6-8** — **early Regular**; eligible to nominate ("bring someone who'd make the room better").

The whole product exists to move people from Day 0 to "early Regular." Everything else is support.

5. Host Briefing Pack (every host gets the same — turns taste into trainable infrastructure)

Before the room (host receives):

- What FINCA is (one line) + what *this* room is for.
- Guest snapshot: # attending · first-timers · coming alone · returning · interests · languages · local:newcomer mix.
- **Suggested introductions** (3-6 named pairings + the "why").
- Watch-outs (who prefers small groups / requested a host intro / first time alone).

Run of show (the rituals):

- **Threshold Toast** — a short welcome that names the room's spirit.
- **No Lost People** — no one stands alone; host or a regular always bridges.

- **Known by Name** — greet newcomers by name; make the first hello for solo arrivals.
- **The first hello** — walk each "coming alone" guest to their first intro within 10 minutes.

What not to do: no hard networking / pitching · no filming without consent · no leaving solo arrivals stranded · no "discovery/outsider" language · don't overfill the room.

Safety: know the report/escalation path · emergency contact · venue safety basics · consent for photos.

After the room (within 24h): upload photos · log who attended / arrived alone / who met whom · send recap (Component 7) · note 1-2 learnings · submit room-quality score (Component 3).

6. Partner Onboarding Pack (sent once a partner says yes — makes the B2B side feel real)

- **FINCA overview** + what "Trusted Place" means (a recommendation, not a listing).
 - **Agreed Founding Partner Pilot** (60-90 days): the perk/activation, the hosted room, the Trusted Place profile.
 - **QR / welcome card** for the venue + placement guidance.
 - **Event expectations** (date, headcount, what FINCA brings, what the venue provides).
 - **Content & photo guidelines** (consent, tone, tagging).
 - **Reporting cadence** — monthly recap: visits, redemptions, repeat visits, bookings, member-loved score, feedback.
 - **Renewal path** — what "working" looks like and the upgrade ladder (Listed→Verified→Passport Partner→Room Host→Featured→Anchor).
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7. Post-Event Recap Template (member-facing, send within 24h)

You were in the room. [Room name], [date].

You met: [names / "3 new people"]. · *Places from the night:* [venue]. · *[Photos link].*

Reconnect: want a warm intro to [name]? · *Save [venue].* · ***Your next room:*** [rec].

[If applicable] You're one room from becoming a Regular.

Internal capture alongside: attendance, arrived-alone, intros made, testimonials, next-room bookings.

8. Founder Sales Script (default spoken pitch)

One-liner: "FINCA helps internationally mobile people become known in a new city — we start with curated rooms and trusted places in Mexico City."

To a partner/venue: "We're not selling exposure. We help the right people discover, return to, and become *regulars* at your venue. Start with one pilot — a member perk and one room — and we report exactly what it drove."

To a sponsor: "A curated, brand-safe room full of internationally mobile, culturally influential people — your brand in a trusted moment, not an ad."

To a member: "New here? Come to one room. Come alone if you want — we'll introduce you. Most people are back by their third."

9. First 100 Manifesto (launch copy + culture-setter)

You are not joining a crowd. You are helping shape the first trusted door into the city.

Bring warmth. Bring curiosity. Bring someone who would make the room better.

Come alone if you need to — we will introduce you.

*This is how a city starts to feel like home. **New here. Known here.***

10. FINCA Language Bank (keep deck, site, WhatsApp, email, partner docs consistent)

Approved: New here. Known here. · Come alone. We'll introduce you. · Rooms worth entering. · Warm intros, not cold DMs. · Trusted places, not random reviews. · Become a regular. · Social by design. Private by default. · Less scrolling. More showing up. · Where you become known. · The first trusted door into a new city.

Banned (brand drift): find your tribe · elite network · exclusive expat club · hidden gems · VIP only · networking mixer · luxury community · high-status members · discover/discovery (outsider-ownership tone).

11. Local Respect Checklist (run before every room — protects the brand in CDMX)

- ☐ Local host *or* local partner involved?
 - ☐ Venue appropriate and respectful to the neighbourhood?
 - ☐ Language avoids "discovery / hidden gem / outsider ownership"?
 - ☐ Spanish-visible communication where needed?
 - ☐ Is the room useful to *locals* too, not just newcomers?
 - ☐ Is there a benefit to the local partner / community?
 - ☐ Local:newcomer mix tracked for this room?
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12. Revenue Decision Tree (stay disciplined — don't monetize too early)

- **Charge members?** → Only once second-visit return is strong *and* paying members behave differently (attend more / return faster / stay longer). Until then: gated upside.
- **Charge partners?** → Yes, when there's clear audience fit, redemption opportunity, or event value to show.
- **Sell sponsorship?** → Yes, when the room has a clear audience and a brand-safe experience.
- **Build the app (beyond prototype)?** → Only after the manual behaviour (recaps, intros, Passport, trusted-place recs, perks) is proven by hand.

13. One City, One Page (gate before any new city launches)

City thesis · target neighbourhoods · first 3 hosts · first 20 partners · first 100 warm leads · local-legitimacy risks · first 3 room formats · sponsor targets · legal/payment considerations · launch budget · launch date · **kill criteria**. *No city launches without this page filled and a clear founder/network advantage.*

14. Proof Library (capture every good moment — feeds deck, site, PR, training)

Store and tag: testimonials · member quotes · partner feedback · event photos/video · intro stories · before/after newcomer stories · repeat-attendance examples · host learnings · safety learnings · founder notes. *One folder, tagged by room + theme. This is your evidence base for the raise.*

15. Decision Log (so old debates stay closed — seeded with decisions to date)

Date	Decision	Status
2026-06	Masterbrand = "Finca" (working), pending legal clearance; deck keeps "FINCA Social Club" (more defensible mark); avoid "Finca Club" as main name	Working
2026-06	Membership = gated upside — activates only after paying members behave differently	Locked
2026-06	Lead revenue = sponsorship + Trusted Places Network; membership/events follow	Locked

Date	Decision	Status
2026-06	PWA before native app ; native is post-raise	Locked
2026-06	Passport = waitlist in all public materials; tiers a working concept, pricing private	Locked
2026-06	North Star = % first-timers → Regulars in 45-60 days (not downloads)	Locked
2026-06	Host-replication test elevated to a core 90-day proof (#2)	Locked
2026-06	Local legitimacy tracked as a weekly metric (local:newcomer ratio)	Locked
2026-06	Trademark clearance required before launch spend (FINCA International collision)	Open — counsel
	<i>(add: pricing decisions · room format decisions · partner offer decisions · expansion decisions)</i>	

Finca — New here. Known here.