01 / PROCESS MAP

Follow one piece of work.

Use this with the owner guide. Map one ordinary task, then mark where it waits or gets copied twice.

Arrives → What starts it?

Work → Who does what?

Check → Who approves?

Done → What is accepted?

PROCESS / OWNER / DATE

Step	Person + source	Output + check	If missing?
1			
2			
3			

WHERE DOES IT WAIT? WHAT GETS COPIED TWICE?



Start with one familiar job.

Paul Lindsey | Salem, Oregon | Editable: 01-process-map.md

02 / THREE OPTIONS

Compare before choosing.

Include a DIY or process option. For each route, note the result, steps, owner, effort, dependencies and costs.

1 DIY / process	2 Assisted workflow	3 Larger change / wait
INTENDED RESULT	**INTENDED RESULT**	**INTENDED RESULT**
STEPS + OWNER	**STEPS + OWNER**	**STEPS + OWNER**
EFFORT + EXTRA COSTS	**EFFORT + EXTRA COSTS**	**EFFORT + EXTRA COSTS**
CHECKS + FALLBACK	**CHECKS + FALLBACK**	**CHECKS + FALLBACK**

FIRST CHOICE + EVIDENCE FOR IT

An estimate is an assumption until tested. Editable: 02-three-options.md

03 / STAFF CHECKLIST

Make the work repeatable.

Give the team a visible sequence and a clear point at which to stop and ask.



TASK / OWNER / VERSION / REVIEW DATE

REQUIRED INPUTS + APPROVED TOOLS

- [ ] **STEP 1**
- [ ] **STEP 2**
- [ ] **STEP 3**

Before accepting: compare with the source; verify names, quantities, prices and dates; get approval; save the result and assign the next action.

STOP AND ASK WHEN / PERSON TO ASK

04 / FIRST PROJECT SCOPE

Draw a clear boundary.

Define what can be accepted, what is outside scope and what happens if the work needs more time.

PROJECT / OWNER / DATE

IN THE FIRST SCOPE

OUTSIDE THIS SCOPE

DELIVERABLE + ACCEPTANCE CHECK

ACCESS + INFORMATION BOUNDARIES

TIME INCL. TESTING + HANDOVER

AGREED EXTERNAL COSTS

IF TIME RUNS OUT / FALLBACK / WHO AGREES A CHANGE

Editable: 04-first-project-scope.md

05 / IMPROVEMENT TRACKER

Measure the whole task.

Record measured figures separately from estimates. Include review, corrections and recurring costs.

Before

Minutes per task

Pilot

Prep + review + fixes

Difference

Before minus pilot

TASK / OWNER / OBSERVATION DATE

TASKS PER WEEK

RECURRING COST PER MONTH

EVIDENCE / ASSUMPTIONS / ACCEPTED OUTPUTS

DECISION

- [ ] KEEP
- [ ] CHANGE
- [ ] STOP

WHAT DID WE LEARN? NEXT REVIEW DATE?

Spreadsheet version: 06-improvement-tracker.csv. Time released is not automatically cash saved.

06 / PROJECT HANDOVER

Leave it usable by the team.

Have someone who did not build it follow the instructions. Record what they could not do without help.

Run it

Check it

Recover it

PROJECT / OWNER / DATE

COMPLETE / STILL TO DO

INSTRUCTIONS + CUSTOM FILES

ACCOUNT ADMIN (NO PASSWORDS)

TOOLS / LICENCES / COSTS

FAILURE + FALLBACK

TESTER + WHAT NEEDS CLARIFYING

MAINTENANCE OWNER + REVIEW DATE



Need a hand with your first project?

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