

The One-Page Process Plan

One process, one page — captured so someone else can run it without coming to you.

Do the Week Audit first (log your hours for a week, circle the blocks only you or one other person can do). Take your number-one and write it up here. One page. If it needs more than one page, the process is really two — split it.

1. PROCESS NAME

WHAT “DONE” LOOKS LIKE — the finished outcome, in one line

2. TRIGGER — what starts it

3. OWNER — the role, not a name

4. THE STEPS — plain verbs, in order. Each one doable without asking you. Keep it under nine.

Then run the Felt-Step Test on each one. Mark **Felt** if a client would notice a machine doing it — that step stays human. Mark **Unfelt** if they wouldn't — that step is an automation candidate.

1		☐ Felt ☐ Unfelt
2		☐ Felt ☐ Unfelt
3		☐ Felt ☐ Unfelt
4		☐ Felt ☐ Unfelt
5		☐ Felt ☐ Unfelt
6		☐ Felt ☐ Unfelt
7		☐ Felt ☐ Unfelt
8		☐ Felt ☐ Unfelt

_____ Unfelt steps out of _____ total — that's your automation shortlist for this one process.

5. JUDGMENT POINTS — the 1–2 spots that genuinely need a human decision. Everything else is mechanical.

6. THE ONE METRIC — the number that says it's working

7. HOW IT'S CAPTURED

☐ Screen recording ☐ Written doc ☐ Checklist

WHERE IT LIVES

8. The three-month test. If you were unreachable for three months, would this process keep running exactly as written? ☐ Yes ☐ No

If no — what's the one thing only you can currently do in it?

This is one process. Most owner-run businesses have six to ten routing through them. Getting them all out of your head, in the right order, and adopted by a team that has its own way of doing things — that's the work. Bring this one to your call.