THE ONE-PERSON BUSINESS TOOLKIT

Editable Worksheets, Calculators & Operating Tools

YOU	SYSTEMS	AI	LEVERAGE	GROWTH

Companion to The One-Person Business
How to Build a Company Without Building a Staff

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THE ONE-PERSON BUSINESS PLAYBOOK

How to Use This Toolkit

This companion workbook turns the appendix tools from The One-Person Business into working documents you can complete, save, revisit, and improve. Use the tool that matches the decision in front of you rather than trying to complete everything at once.

RECOMMENDED SEQUENCE	
If you are...	**Start with...**
Choosing a business	Opportunity Scorecard + Problem & Niche Validation
Clarifying the model	One-Page Business Canvas + Offer Builder
Already selling	Pricing & Revenue + EADS Audit + SOP Template
Using AI or contractors	AI Delegation Planner + Contractor Project Brief
Building demand	90-Day Acquisition Planner
Running the business monthly	CEO Dashboard + Technology Stack Audit

COMPANION FILES

The Excel companion includes automated versions of the Opportunity Scorecard, Pricing & Revenue Calculator, EADS Audit, AI Delegation Planner, 90-Day Acquisition Planner, CEO Dashboard, and Technology Stack Audit. Use the Word/PDF tools for thinking and planning; use the Excel workbook when calculations or recurring tracking matter.

READER LICENSE

TOOL A

One-Person Business Opportunity Scorecard

Score a business concept before committing significant time or money. Rate each dimension from 1 to 5, then redesign the weak points rather than accepting them as fixed.

Dimension	1 = Weak	3 = Moderate	5 = Strong	Score
Gross Margin Potential	Low margins / high direct cost	Moderate margins	Very high margins / low incremental cost	
Startup Cost	Significant capital before first sale	Moderate investment	Can be tested cheaply	
Recurring Revenue Potential	Mostly one-time	Some repeat / retainer potential	Strong recurring / subscription fit	
Delivery Repeatability	Every customer is different	Some standardization	Highly repeatable delivery	
Automation Potential	Mostly manual	Some automation	Much can be automated	
Customer Acquisition Simplicity	Hard or expensive to reach	Reachable with focus	Predictably reachable	
Pricing Power	Commodity / price-driven	Some differentiation	Clear value supports premium pricing	
Owner Dependency	Owner performs nearly all value	Some transfer possible	Owner needed only at high-value points	
Customer Pain	Nice-to-have	Annoying / moderately costly	Urgent, expensive, risky or strategic	
Scale Without Headcount	Labor grows with revenue	Some leverage	Revenue can outgrow staffing	

Total Score	______ / 50
Interpretation	____

Redesign the weak points

What are the two lowest-scoring dimensions? How could pricing, scope, delivery, customer segment, automation, or the revenue model improve them?

TOOL B

The One-Page One-Person Business Canvas

Capture the business model on one page. If an answer takes a paragraph, keep working until the decision is simpler.

1. Customer

Who exactly are you serving?

2. Painful Problem

What problem are they actively trying to solve?

3. Desired Outcome

What changes after buying?

4. Offer

What exactly will the customer receive?

5. Price & Revenue Model

How much will you charge, and is the revenue one-time, recurring, usage-based, licensing, or other?

6. Customer Acquisition

What is the primary way customers will discover you?

7. Sales Process

What steps move a prospect from interest to purchase?

8. Fulfillment

What are the major steps required to deliver the result?

9. Leverage

What will software, AI, contractors, templates, intellectual property, or partners handle?

10. Major Risk

What is the single biggest assumption that could make the model fail?

11. Next Test

What is the cheapest, fastest way to test that assumption?

ECONOMICS SNAPSHOT	
Average customer revenue	$__________
Estimated gross profit / customer	$__________
Estimated CAC	$__________
Estimated owner hours / customer	__________
Target recurring revenue	_____ %

TOOL C

Problem & Niche Validation Worksheet

Use one worksheet for each market you are considering. Look for repeated evidence of painful problems, existing spending, urgency, and accessible buyers.

Market	
Target Customer	
PROBLEM 1	
Problem	
Severity (1-5)	
Frequency (1-5)	
Economic Cost (1-5)	
Urgency (1-5)	
Current Workaround	
Evidence / Exact Customer Language	
PROBLEM 2	
Problem	
Severity (1-5)	
Frequency (1-5)	
Economic Cost (1-5)	
Urgency (1-5)	
Current Workaround	
Evidence / Exact Customer Language	
PROBLEM 3	
Problem	
Severity (1-5)	
Frequency (1-5)	

Economic Cost (1-5)	
Urgency (1-5)	
Current Workaround	
Evidence / Exact Customer Language	

EVIDENCE CHECKLIST

[ ] Customers describe the problem without prompting
[ ] The problem occurs frequently enough to matter
[ ] The target customer can be reached efficiently
[ ] Customers already spend money or internal time on it
[ ] A buyer with authority can be identified
[ ] The problem is painful enough to support a real budget

Validation decision

What evidence would make you continue, narrow the niche, change the problem, or stop?

TOOL D

Customer Discovery Interview Guide

The goal is learning, not selling. Use the questions flexibly and capture the customer's exact phrases whenever possible.

OPENING SCRIPT

"I'm researching how [type of customer] currently handles [problem area]. I'm not here to pitch you. I'd like to understand what is working, what is frustrating, and how important the issue really is."

#	Interview Question	Notes
1	How are you handling this today?	
2	What is the hardest part of the current process?	
3	How much time does it typically take?	
4	What tends to go wrong?	
5	What happens when the problem is not solved well?	
6	How often does this issue occur?	
7	What have you already tried?	
8	What do current solutions cost in money or internal time?	
9	Who cares most about fixing it?	
10	Who would normally approve a purchase?	
11	How urgent is the issue compared with other priorities?	
12	What would an ideal solution look like?	
13	What would make you skeptical of a new solution?	
14	If the problem disappeared tomorrow, what would improve?	
15	What should I have asked that I did not?	

AFTER THE INTERVIEW

Most painful statement	
Current workaround	
Economic consequence	
Buying authority	

Evidence of willingness to pay	
What surprised me	

TOOL E

The Irresistible Offer Builder

Turn a broad capability into a specific offer that customers can understand, repeat, compare, and buy.

Customer

I serve...

Problem

They struggle with...

Desired Outcome

They want...

One-Sentence Offer

We help _________ achieve _________ without _________.

Delivery Method

How is the result delivered?

Timeframe

How long does the standard engagement last?

Customer Responsibilities

What must the customer provide?

What Is Not Included

What is explicitly outside scope?

Risk Reduction

How can you reduce buying risk without making an irresponsible guarantee?

First Transaction

What smaller purchase lets the customer experience value first?

Why This Is Different

What is the most important reason to choose this offer over the common alternative?

STANDARD DELIVERABLES

#	Deliverable
1	
2	
3	
4	

THREE-TIER PRICING

Tier	Price	Best for	Key difference
Starter	$		
Professional	$		
Premium	$		

TOOL F

Pricing & Revenue Goal Worksheet

Work backward from the income you want and the time you are willing to spend. The spreadsheet companion performs these calculations automatically.

STEP 1 - DEFINE THE FINANCIAL GOAL	
Desired annual owner income / profit	$__________
Annual software & technology	$__________
Annual contractor cost	$__________
Annual marketing cost	$__________
Professional services & insurance	$__________
Other operating expenses	$__________
Contingency reserve	$__________
Required annual revenue target	$__________

STEP 2 - TEST CUSTOMER VALUES

Average annual customer revenue	Customers required
$500	
$1,000	
$2,500	
$5,000	
$10,000	
$25,000	

STEP 3 - ADD THE TIME CONSTRAINT	
Target annual owner hours	__________
Maximum owner hours / customer	__________
Can planned customer count fit?	[ ] Yes [ ] No

[ ] Price [ ] Scope [ ] Automation

[ ] Contractor support [ ] Customer type [ ] Revenue model

STEP 4 - RECURRING REVENUE TARGET	
Desired recurring revenue %	_____ %

Annual recurring revenue target	$__________
Monthly recurring revenue target	$__________

Recurring problem

What recurring customer problem could support this revenue?

TOOL G

Eliminate-Automate-Delegate-Systemize Audit

List recurring activities before judging them. Then identify which work should disappear, move to a tool, move to someone else, become a system, or remain with you.

Activity	Hrs/Mo	Value?	Owner Judgment?	Eliminate?	Automate?	AI?	Delegate?	SOP?	Decision

Use Yes / No / Partly for the diagnostic columns. Final decision: Eliminate / Automate / Delegate / Systemize / Keep Personally.

Priority question

Which three activities would give you the most time back if removed from your weekly workload?

TOOL H

Minimum Viable SOP Template

Document recurring work just enough that the next person—or your future self—can perform it consistently without rebuilding the process from memory.

Process Name	
Owner	
Last Updated	

Purpose

What result should this process reliably produce?

Trigger

What causes the process to begin?

Required Inputs

What information, files, permissions, or materials are required?

Steps

Write the minimum sequence needed for a competent person to complete the work.

Expected Output

What should exist when the process is complete?

Quality Check

How do we know the work is correct and complete?

Exceptions

What situations require owner judgment or escalation?

Automation Opportunities

Which steps could be handled or assisted by software or AI?

TOOL I

AI Delegation Planner

Choose the right role for AI rather than forcing AI into every task. Estimate time saved and define the human review that protects quality.

Task	Current Hrs/Mo	Best AI Role	Est. % Saved	Human Review Focus	Workflow / Prompt Name

Suggested AI roles: brainstorm/assist; first draft; analyze/summarize; perform most of task with human review; automated workflow; human only.

HUMAN REVIEW CHECKLIST

[ ] Facts
[ ] Sources
[ ] Confidentiality
[ ] Strategic judgment
[ ] Numbers
[ ] Tone
[ ] Legal/compliance implications
[ ] Customer-specific context

AI operating rule

What must always be verified personally before an AI-assisted output reaches a customer or drives a consequential decision?

TOOL J

Contractor Project Brief

Buy a defined outcome, not vague activity. A good brief reduces rework, improves comparison between providers, and makes accountability easier.

Project Name

Business Objective

Why does this project matter?

Deliverable

Exactly what should be produced?

Target Audience / User

Who will use or see the work?

Inputs & Reference Materials

What will you provide?

Required Format

File types, dimensions, platform, or other constraints.

Quality Standard

What does "done well" mean?

Deadline

Milestones

What checkpoints should occur before final delivery?

Revision Allowance

How many rounds / what counts as a revision?

Communication Method

Where and how should questions be handled?

Owner-Controlled Accounts or Files Required

What access is necessary?

Final Acceptance Criteria

What must be true before the project is complete?

TOOL K

90-Day Customer Acquisition Planner

Choose one primary customer and one primary acquisition channel, then run a disciplined 90-day test before changing direction.

Primary Customer	
Primary Acquisition Channel	
90-Day Objective	

CHANNEL OPTIONS

[ ] SEO / search content	[ ] LinkedIn	[ ] YouTube
[ ] Targeted email outreach	[ ] Paid search	[ ] Social advertising
[ ] Marketplace	[ ] Partnerships / affiliates	[ ] Other

WEEKLY ACTIVITY TARGETS

Prospects researched	
Outbound messages / contacts	
Content pieces published	
Partner contacts	
Paid media budget	$
Follow-ups	

FUNNEL TARGETS

People reached / week	
Responses / visitors	
Qualified leads	
Sales conversations	
Proposals / trials	
New customers	

13-WEEK TRACKING

Week	Reached	Responses	Qualified	Conversations	Proposals	Customers	Spend
1							

2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

Weekly review

What worked? Where did prospects drop out? What one variable will you improve next week?

END-OF-90-DAY DECISION

[ ] Continue and scale

[ ] Continue with changes

[ ] Test a different message

[ ] Test a different customer segment

[ ] Test a different channel

[ ] Stop this channel

TOOL L

The One-Person CEO Dashboard

Review these numbers monthly. Add metrics only when they help you make a decision. Use the Excel companion for formulas, trends, and automatic calculations.

MONTHLY SCORECARD			
Metric	**This Month**	**Last Month**	**Target / Guardrail**
Revenue	$	$	$
Monthly recurring revenue	$	$	$
Recurring revenue %			
Gross margin			
Operating profit	$	$	$
New leads			
Qualified leads			
New customers			
Customer acquisition cost	$	$	$
Average customer revenue	$	$	$
Estimated customer lifetime value	$	$	$
Retention / repeat-purchase rate			
Owner hours			
Owner profit	$	$	$
Profit per owner hour	$	$	$
Cash reserve	$	$	$
Largest customer as % of revenue			

MONTHLY CEO QUESTIONS

What created the most profit this month?

What consumed the most owner time?

What repeated task should be eliminated, automated, delegated, or systemized next?

What is the single biggest constraint on growth right now?

What will I deliberately not work on next month?

TOOL M

Technology Stack Audit

Control tool sprawl. A one-person business should use the smallest technology stack that reliably runs the business.

CORE CATEGORIES

Category	Purpose	Current Tool	Monthly Cost	Keep / Change?
Website & Domain	Credibility, information, lead capture, sales			
Business Email	Professional communication and account administration			
Payment Processing	Payments and recurring subscriptions			
Accounting	Income, expenses, reconciliation, reporting			
CRM	Prospects, customers, follow-up			
Scheduling	Qualified booking without email ping-pong			
Project Management	Tasks, deadlines, recurring processes, contractor work			
Cloud Storage	Secure and organized files			
Automation	Connect systems and trigger routine actions			
Email Marketing	Owned distribution and nurture			
AI	Research, drafting, analysis, documentation, workflows			
Analytics	Traffic, conversion, acquisition, behavior			
Security	Passwords, MFA, backups, permissions			

QUARTERLY STACK AUDIT

[ ] Do I still use it?

[ ] Does it save meaningful time or improve revenue?

[ ] Does another tool already do the same thing?

[ ] Is the data portable if I leave?

[ ] Is this tool creating complexity elsewhere?

Simplification decision

Which tool could I remove, consolidate, downgrade, or replace this quarter?

TOOL N

25 One-Person Business Models to Consider

Use this as an idea bank, not a list of 25 businesses to chase. Score promising options with Tool A before committing significant time or money.

Business Model	Why It Can Fit
1. Specialized Consultant	Serve a narrow market with high-value expertise.
2. Productized Consulting Service	Sell a defined outcome, timeframe, and deliverable for a fixed price.
3. Competitive Intelligence Service	Monitor competitors, markets, pricing, or strategic developments.
4. Industry Research Subscription	Provide recurring reports, forecasts, benchmarks, or market updates.
5. Niche Newsletter	Build a focused audience and monetize through subscriptions, sponsors, products, or services.
6. Paid Membership	Provide ongoing resources, community, training, or access.
7. Online Course	Package repeatable expertise into structured education.
8. KDP Publishing Business	Create a coherent catalog where one title can lead readers to others.
9. Template Business	Sell spreadsheets, design assets, prompts, and planning tools.
10. Digital Download Business	Sell printable or downloadable information products.
11. Micro-SaaS	Build focused software for one narrow problem.
12. AI-Enabled SaaS	Use AI to automate a valuable workflow.
13. Lead-Generation Website	Build niche traffic and sell qualified leads.
14. Affiliate Publishing	Help buyers make decisions and earn commissions on referrals.
15. Niche Directory	Organize fragmented information and monetize access, listings, sponsors, or leads.
16. Data Subscription	Collect, clean, organize, and update valuable information.
17. Paid Community	Create a focused peer network built on curation and access.
18. Licensing Business	License intellectual property, methods, content, software, or designs.
19. Coaching Program	Combine education, accountability, and selected personal guidance.
20. Virtual Advisory Service	Offer recurring strategic access without a full-time executive.
21. Recruiting Sourcing Service	Provide targeted candidate research or pipeline development.
22. Specialized Marketing Service	Solve one measurable marketing problem for one customer type.
23. Research-as-a-Service	Perform recurring research using automation, AI, and human review.
24. Ecommerce Brand With Outsourced Fulfillment	Own brand and customer relationship while outsourcing logistics.
25. Monitoring & Intelligence Service	Track changing projects, regulations, competitors, prices, grants, permits, or opportunities.

Final filter

Which three models best match your expertise, accessible customers, capital constraints, and preferred working style?

BUILD MORE CAPABILITY. NOT MORE OVERHEAD.

Eliminate • Automate • Delegate • Systemize • Leverage

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