

THE ONE-PERSON BUSINESS OPERATING SYSTEM COMPLETE TOOLKIT

Printable Companion Workbook · Book 6 of The One-Person Business Playbooks

Use these tools to make the business easier to see, easier to run, and less dependent on memory. Start with the tools that solve a real problem.

Copyright © 2026 James Inglis. The purchaser or reader may copy and adapt these tools for personal use or for use inside a business they own or manage. The toolkit may not be resold, republished, or redistributed as a standalone product.

TEMPLATE 1 — One-Person Business Command Center

Purpose: See the condition of the business on one page and identify what deserves attention.

Financial measures (2–3)	
Sales measures (1–3)	
Customer measures (1–3)	
Work / capacity measures (1–3)	
Marketing measures (1–3)	
What is GREEN?	
What is YELLOW?	
What is RED?	
What requires a decision?	

TEMPLATE 2 — Annual Direction Sheet

Purpose: Set enough direction for the year without pretending you can predict every step.

Financial — By year-end, the business will...	
Strategic — The most important change we will make is...	
Customers — By year-end, our customer base/relationships will...	
Offer — Our products/services will...	
Owner — My role, schedule, or quality of life will...	
What we will deliberately not pursue this year	
Three assumptions this plan depends on	

TEMPLATE 3 — 90-Day Operating Plan

Purpose: Turn annual direction into three finishable quarterly outcomes.

Priority 1 — Outcome	
Why it matters	
Measure	
Deadline	
Milestones	
Next physical action	
Priority 2 — Outcome	
Why it matters	
Measure	
Deadline	
Milestones	
Next physical action	
Priority 3 — Outcome	
Why it matters	
Measure	
Deadline	
Milestones	
Next physical action	
Operating commitments that must continue	
Capacity reserve %	
Not This Quarter	

TEMPLATE 4 — Monthly Priority Planner

Purpose: Bridge the quarter and the week.

Month	
Quarterly outcome that must move most this month	
Monthly outcome 1	
Monthly outcome 2	
Monthly outcome 3	
Important operating obligations	
Known capacity constraints	
Decisions required this month	
One thing I will not start this month	

TEMPLATE 5 — Weekly CEO Meeting Agenda

Purpose: Give the owner a consistent management checkpoint.

Date	
1. Last week — What completed? What slipped? Why?	
2. Command center — What moved yellow or red?	
3. Customers — Who is waiting on me?	
4. Sales — Which opportunities need next actions?	
5. Projects — On track / At risk / Blocked	
6. Money — Cash, receivables, upcoming obligations	
7. CEO decisions — Decide / Gather / Defer	
8. Next week — Three outcomes	
9. Capacity — Is next week realistic?	
Emergency 15-minute version: Risk Customers Cash Sales Three Outcomes	

TEMPLATE 6 — Daily Three Planner

Purpose: Keep incoming work from determining the entire day.

Date	
MUST MOVE — If only one meaningful thing advances today	
Maintain #1	
Maintain #2	
Communication window #1	
Communication window #2	
Protected focus block	
Likely interruption or constraint	
Completed	
Open promises captured? Yes / No	
Tomorrow's likely Must Move	

TEMPLATE 7 — Recurring Workflow Mapper

Purpose: Turn repeated work into a predictable process.

Workflow name	
Trigger	
Customer / recipient	
Desired outcome	
Completion condition	
Step 1	
Step 2	
Step 3	
Step 4	
Step 5	
Likely exceptions	
Where does judgment remain human?	

TEMPLATE 8 — One-Page SOP Builder

Purpose: Document the minimum useful process without creating bureaucracy.

SOP name	
Purpose	
Trigger	
Tools / systems	
Standard of quality	
Completion condition	
Exceptions / judgment calls	
Step 1	
Step 2	
Step 3	
Step 4	
Step 5	
Step 6	
Step 7	

TEMPLATE 9 — Automation Opportunity Audit

Purpose: Eliminate, simplify, standardize, then automate.

[illegible]

TEMPLATE 10 — Weekly Financial Pulse

Purpose: A management view of money — not a replacement for bookkeeping or tax advice.

Cash on hand	
Tax reserve / restricted cash	
Accounts receivable	
Overdue receivables	
Expected cash in next 30 days	
Committed expenses next 30 days	
Average monthly operating outflow	
Revenue month-to-date	
Revenue target this month	
Available operating cash	
Cash runway (months)	
Revenue vs target	

TEMPLATE 11 — Customer Lifecycle Map

Purpose: Make the handoffs visible from first contact through repeat and referral.

Stage	Customer goal	Your goal	Trigger	Key action	Complete when	Risk
Lead						
Prospect						
Buyer						
Onboarding						
Delivery						
Follow-up						
Repeat / referral						

TEMPLATE 12 — Customer + Prospect Next-Action Tracker

Purpose: Every live relationship needs a next action and a date.

[illegible]

TEMPLATE 13 — Capacity Allocation Planner

Purpose: Protect room for the unexpected before the calendar is full.

Available working hours/week	
Customer delivery	
Selling / business development	
Marketing / content	
Administration	
Improvement / systems	
Meetings / communication	
Committed hours	
Capacity used	
Uncommitted buffer (hours)	
Buffer %	

TEMPLATE 14 — Monthly Business Review

Purpose: A weekly meeting runs the business. A monthly review improves it.

Area	Improved	Deteriorated	Evidence	Decision	Bottleneck?	Next experiment
Performance						
Customers						
Sales						
Marketing						
Operations						
Financials						
Owner / capacity						

TEMPLATE 15 — Operating Independence Assessment

Purpose: What breaks when you stop touching the business?

Lead handling	
Customer communication	
Delivery	
Billing / collections	
Marketing	
Sales follow-up	
Administration	
Reporting / controls	
Breaks within 1 day	
Breaks within 1 week	
First system to strengthen	

TEMPLATE 30 — 30-Day Operating System Installation

Purpose: Install the minimum useful system first. Improve it after you use it.

Day	Focus / action	Done?	What changed?	Next adjustment
Day 1	Complete a mental inventory dump			
Day 2	Assign every item to a home			
Day 3	Complete the Annual Direction Sheet			
Day 4	Choose up to three 90-day outcomes			
Day 5	Build the first Command Center			
Day 6	Define your Daily Three routine			
Day 7	Run a short weekly review			
Day 8	Map the customer lifecycle			
Day 9	Put every live relationship on the map			
Day 10	Complete the first Financial Pulse			
Day 11	Measure a normal week			
Day 12	Complete the Capacity Planner			
Day 13	Choose one recurring process			
Day 14	Map trigger, steps, and completion condition			
Day 15	Document the process on one page			
Day 16	Audit one repetitive task			
Day 17	Eliminate or simplify before automating			
Day 18	Create one reusable template			
Day 19	Define one exception rule			
Day 20	Review receivables and cash obligations			
Day 21	Run the Weekly CEO Meeting			
Day 22	Identify the biggest owner bottleneck			
Day 23	Strengthen the system around that bottleneck			
Day 24	Review open promises			
Day 25	Remove one low-value recurring task			

Day	Focus / action	Done?	What changed?	Next adjustment
Day 26	Tighten one workflow			
Day 27	Check capacity reserve			
Day 28	Run a mini monthly review			
Day 29	Complete the Independence Test			
Day 30	Decide what to improve next			