



LATIMER DIGITAL

FOUNDERP STARTER KIT

Four operating templates for a business that
runs on one person's memory.

The operating templates for a business that currently runs on one person's memory.

This kit is for the founder who is the whole company. You do the selling, the delivery, the invoicing, and the follow-up, and the only place all of it connects is your head. That works until it doesn't – until you take a week off, or hire someone, or simply run out of the attention it takes to hold everything at once.

The fix is not more discipline. It is writing down the small number of things that actually repeat, so they can be handed to a system, a tool, or a person. That is what these four templates do.

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Every hat you currently wear, named and separated.

02

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The repeatable work, written once so it can be delegated.

03

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04

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Where each piece of your business actually lives.

Work through them in order. Template 1 takes about an hour. The rest build on it.

01

ROLE MAP

Every hat you currently wear, named and separated.

A solo business is not one job. It is six or seven jobs held by one person, and they compete for the same hours. Naming them separately is what makes the competition visible.

List every role you currently hold. For each, write what it is responsible for, roughly how many hours a week it takes, and whether it is the highest use of your time. Be honest about the last column — it is the one that drives every later decision.

EXAMPLE · Sales. Responsible for outreach, proposals, follow-up. Six hours a week. Only you can do this, for now.

ROLE 1 _____

ROLE NAME _____

RESPONSIBLE FOR _____ HOURS PER WEEK _____ ONLY YOU CAN DO THIS? _____

ROLE 2 _____

ROLE NAME _____

RESPONSIBLE FOR _____ HOURS PER WEEK _____ ONLY YOU CAN DO THIS? _____

ROLE 3 _____

ROLE NAME _____

RESPONSIBLE FOR _____ HOURS PER WEEK _____ ONLY YOU CAN DO THIS? _____

ROLE 4

ROLE NAME

RESPONSIBLE FOR	HOURS PER WEEK	ONLY YOU CAN DO THIS?

ROLE 5

ROLE NAME

RESPONSIBLE FOR	HOURS PER WEEK	ONLY YOU CAN DO THIS?

ROLE 6

ROLE NAME

RESPONSIBLE FOR	HOURS PER WEEK	ONLY YOU CAN DO THIS?

When you finish: total the hours. If the total exceeds the hours you actually have, you have found the real problem, and it is not motivation.

TOTAL HOURS PER WEEK

02 PROCESS RECORD

The repeatable work, written once so it can be delegated.

Anything you have done more than three times is a process, whether or not you have written it down. Unwritten processes cannot be delegated, automated, or improved – they can only be repeated by you.

Fill one of these out for each repeating task. Aim for the level of detail a competent stranger would need. Do not describe the ideal version; describe what you actually do.

Process Record

COPY 1 OF 6

PROCESS NAME

WHICH ROLE OWNS IT

WHAT TRIGGERS IT

HOW OFTEN IT RUNS

STEPS, IN ORDER

1

2

3

4

5

6

7

8

9

TOOLS IT TOUCHES

WHAT “DONE” LOOKS LIKE

COULD THIS BE DELEGATED OR AUTOMATED?

WHAT BREAKS IF IT IS SKIPPED

Process Record

PROCESS NAME

WHICH ROLE OWNS IT

WHAT TRIGGERS IT

HOW OFTEN IT RUNS

STEPS, IN ORDER

1

2

3

4

5

6

7

8

9

TOOLS IT TOUCHES

WHAT “DONE” LOOKS LIKE

COULD THIS BE DELEGATED OR AUTOMATED?

WHAT BREAKS IF IT IS SKIPPED

Process Record

COPY 3 OF 6

PROCESS NAME

WHICH ROLE OWNS IT

WHAT TRIGGERS IT

HOW OFTEN IT RUNS

STEPS, IN ORDER

1

2

3

4

5

6

7

8

9

TOOLS IT TOUCHES

WHAT “DONE” LOOKS LIKE

COULD THIS BE DELEGATED OR AUTOMATED?

WHAT BREAKS IF IT IS SKIPPED

Process Record

COPY 4 OF 6

PROCESS NAME

WHICH ROLE OWNS IT

WHAT TRIGGERS IT

HOW OFTEN IT RUNS

STEPS, IN ORDER

1

2

3

4

5

6

7

8

9

TOOLS IT TOUCHES

WHAT “DONE” LOOKS LIKE

COULD THIS BE DELEGATED OR AUTOMATED?

WHAT BREAKS IF IT IS SKIPPED

Process Record

COPY 5 OF 6

PROCESS NAME

WHICH ROLE OWNS IT

WHAT TRIGGERS IT

HOW OFTEN IT RUNS

STEPS, IN ORDER

1

2

3

4

5

6

7

8

9

TOOLS IT TOUCHES

WHAT “DONE” LOOKS LIKE

COULD THIS BE DELEGATED OR AUTOMATED?

WHAT BREAKS IF IT IS SKIPPED

Process Record

PROCESS NAME	WHICH ROLE OWNS IT
WHAT TRIGGERS IT	HOW OFTEN IT RUNS
STEPS, IN ORDER	
1	
2	
3	
4	
5	
6	
7	
8	
9	
TOOLS IT TOUCHES	WHAT “DONE” LOOKS LIKE
COULD THIS BE DELEGATED OR AUTOMATED?	WHAT BREAKS IF IT IS SKIPPED

03 WEEKLY OPERATING REVIEW

The thirty-minute loop that keeps the system honest.

A system that is never reviewed decays into a filing cabinet. This is the loop that keeps it alive. Thirty minutes, same slot every week, and it survives being done badly far better than being skipped.

Answer these five questions in writing. The writing matters – thinking it through in your head produces the feeling of review without the record of one.

1 What did I commit to last week, and did it happen?

2 What made money this week?

3 What did I do that someone else could have done?

THE ENGINE

4 What is blocked, and on whom?

5 What are the three things that must happen next week?

1

2

3

The third question is the engine. Everything it surfaces, week after week, is your delegation and automation backlog – in priority order, discovered rather than guessed.

04

SYSTEM MAP

Where each piece of your business
actually lives.

Most solo businesses accumulate tools rather than choosing them. The result is information scattered across a dozen places, none of them authoritative, and a founder who is the only index.

For each function, name the single tool that is the source of truth. If two tools both hold customer records, one of them is wrong – decide which, and write it down here.

SOURCE OF TRUTH	WHO UPDATES IT	REVIEWED HOW OFTEN
Customers and pipeline		
Money in and out		
Work in progress		
Documents and files		
Calendar and commitments		
Communication with clients		

THE RULE THAT MAKES THIS WORK · One function, one source of truth. Duplication is not redundancy – it is the beginning of two versions of reality.

FINISH

What to do next

You now have the four documents that let a business run on something other than memory. Filling them in is the work; nothing here helps until they are actually completed.

☐

Block ninety minutes this week. Complete Template 1 and one copy of Template 2.

☐

Put the Weekly Operating Review on your calendar as a recurring commitment before you close this document.

☐

Complete Template 4 last, once you have seen which tools your processes actually touch.

GO FURTHER

The FoundERP Professional tier adds the workbook and the recorded course that walk through each template in depth, including the decisions this kit only names. The Enterprise tier builds it with you in a live session.