

O P E R A T O R G U I D E

How to Document a Business So Someone Else Can Run It

Documenting a business means writing down how the work gets done so someone else can run it without asking you. It is not a binder. It is the processes, the owners, the tools, and the decisions that keep the work moving.

01 What to document

- ☐ The core processes. How work starts, moves, and finishes.
- ☐ The owners. Which role is responsible for each process.
- ☐ The tools. Where the work lives and how the team uses them.
- ☐ The numbers. What gets reported, how often, and to whom.
- ☐ The exceptions. What breaks and how it gets fixed.

02 How to document it

- ☐ Start with the processes you explain more than once.
- ☐ Write one process at a time. One page. Steps that start with a verb.
- ☐ Name the role, not the person.
- ☐ Put it where the work happens, not in a folder.
- ☐ Review it with the person who will own it. Then stop explaining it.

03 What good documentation looks like

Someone who has never done the work can follow it. The same problems do not come back. The owner can update it without you. You are no longer the only person who knows how it works.

If the only place the process lives is in your head, it is not documented. Write it down.

04 What to do next

Pick the one process you explain most often. Write it. Name the owner. Put it where the work happens. Then move to the next one. Start with the work that still runs through you.