

BOOTSTRAP
— YOUR BUSINESS —

FOUNDERS JOURNEY · STAGE 8 OF 9

Systemization Guide

Turn what already works into clear steps anyone could repeat.

Repeat it first. Write it down second.

Systemization is where steady, repeated work becomes a clearer way of operating. The goal isn't red tape. It's turning what already works into simple systems that are easier to repeat, teach, improve, and one day hand off.

WHAT MATTERS NOW	YOUR FIRST STEP	WHAT COMES NEXT
Steady repeated work, who owns each step, handoffs, what done looks like, and exceptions.	Pick one steady, repeated process that deserves a clearer way of working.	Organization: making it clear who does what as the business grows.

WHAT YOU'LL HAVE BY THE END

- A clear line between work that's steady enough to write down and work that's still changing.
- At least one important task written down well enough to repeat or teach.
- Clear owners, handoffs, results, and common exceptions for that task.
- A sense of what's worth measuring, handing off, or automating later, and what can wait.

01 Systemize what has earned it

Only write down work that has repeated enough for you to know how it really goes.

A process is ready when it's important, it repeats, and it's steady enough that doing it the same good way every time would cut mistakes or effort. A system captures what experience already taught you. It shouldn't lock in a guess before you understand the work.

SIGNS A PROCESS MAY BE READY

It repeats	The same work happens often enough that doing it differently each time causes problems.
It's steady	The important steps are mostly understood, not changing every time.
Mistakes cost something	Delays, missed handoffs, or redoing work hurt the customer or the business.
Someone else could do it	Another person could follow it, if it were written clearly.

> **The core idea**
> A system should capture a way of working that's already proven. It takes the load off your memory without freezing work that still needs to change.

02 Design the simple system

Turn one proven pattern into a dependable path from start to finish.

The system might be a checklist, a template, a shared record, a schedule, or a simple tool. Start with the smallest structure that makes the process clearer and more dependable. Add more only when the work proves it's needed.

FIVE PARTS OF A SIMPLE SYSTEM

1. What starts it	The event that kicks off the process, and what information has to be ready.
2. Who owns it	Who keeps it moving, and who's responsible at each handoff.
3. The key steps	The few steps that must happen every time for a good result.
4. What done looks like	How anyone can tell the work is finished and good enough.
5. Exceptions	The common surprises, and how you'll learn from them to improve the system.

SIGNS IT'S WORKING

- Important work depends less on one person remembering every step.
- It has a clear start, owner, result, and handoffs.
- Someone can follow it without knowing its whole history.
- Breakdowns are visible enough to fix.
- Any numbers you track help a real decision.

SIGNS TO SLOW DOWN

- You're automating something that changes every time.
- You're writing up rare cases before the normal path is clear.
- You're adding approvals to fix a process that's just unclear.
- You're writing down low-value work just because you can.

> **Standardize the important part, not every detail**
> A good system creates enough consistency to be reliable, while leaving room for judgment when real exceptions come up.

03 Choose your first step

Pick one steady, important process that would benefit from clear steps.

Don't systemize the whole business at once. Write down the real steps of one process, use them the next time it happens, and improve them based on what actually happened.

GOOD FIRST STEPS CAN BE

- Writing the steps of one repeated task in the order they happen today.
- Deciding what starts the process and what a good finish looks like.
- Naming one clear owner for the process or for a key handoff.
- Turning the proven steps into a short checklist or template.
- Listing the common exceptions that need judgment, not a fixed rule.
- Running it once, noting where reality differed, and improving the next version.

DO IT FOR LESS

Start free. Pay only at the wall.

Writing down your steps is free. Automate only what you repeat often, and start with free plans.

- Write each process in a free document or notes app before paying for any process software.
- Turn steps into free templates: a saved email, a copy-and-fill document, or a checklist you reuse.
- Record a free screen video of yourself doing a task. It's often the fastest way to teach it.
- Try the free plan of an automation tool, like Zapier or Make, for one task you repeat every week.

Move up to a paid automation plan only when you regularly use up the free plan's monthly limit on work you truly repeat. Then move up one plan.

DO IT WITH AI

Let AI do the heavy lifting

Copy these into any free AI tool, like ChatGPT, Claude, or Gemini. Fill in the brackets first.

Write my steps clearly

Here's how I do [a task I repeat]*, in my own words:* [your description]*. Turn it into clear step-by-step instructions someone else could follow, with what starts it, who owns it, and what done looks like.*

Find what to automate

Here are the steps of my process: [your steps]*. Mark which steps could be automated with free tools, which need a person's judgment, and which one is worth automating first.*

Spot the exceptions

For this process: [your steps]*, list the most common things that could go differently or wrong, and suggest a simple rule or judgment call for each one.*

Check the answer: AI will write tidy steps that may not match how the work really goes. Test them on the next real round and fix what's off.

NOT YET

What can wait

- Automating a process that still changes every time.
- Writing up every rare case before the normal path is clear.
- Buying big-company software because a larger business uses it.
- Dashboards or numbers that don't change a decision.
- Adding layers of approval to fix a process that's simply unclear.
- Writing down low-value work just because it can be written down.

COMING UP

Organization

Systemization makes important work easier to repeat and teach. Organization is where responsibilities, decisions, and coordination get clearer as the business grows. You move forward when there are enough people, decisions, or handoffs that clearer roles would cut confusion.

Systemization isn't process for its own sake. It's making proven work easier to repeat, teach, improve, and hand off.