

SoloHatch

One-Person Company Workflow Map Report

Public Sample Report

Sample report ID	SAMPLE-WORKFLOWMAP-001
Report language	English
Sample profile	Solo service provider with a repeatable offer and scattered client handoffs
Generated for	Public preview only

Important	This public sample uses fictional answers. It is provided only to show the report format, level of detail, and practical style. It is not a customer report, not a live consultation, and not a guarantee of business results.
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Sample answer area	Fictional sample input
Current offer	A productized strategy sprint for small professional service teams.
Main workflow	Enquiry, qualification, payment, intake, workshop prep, delivery, follow-up, and repeatable client notes.
Current blocker	Important information is split across email, forms, calls, and manual reminders.
Preferred workflow goal	Create one clear operating map with handoff points, reusable inputs, and human review checkpoints.

Workflow Snapshot

The sample profile already has a sellable offer and repeated client steps. The weakness is operational drag: each project start requires too many manual checks and scattered notes.

This is the right stage for a workflow map because there is enough repetition to document, simplify, and partially assist with AI tools without pretending the service can run by itself.

Workflow stage	Repeatable but scattered
Best first fix	Map enquiry to delivery with one owner, one input, and one next action per step.

Customer Journey Map

The buyer moves through eight steps: enquiry, qualification, fit decision, payment, intake, preparation, delivery, and follow-up. The biggest friction appears between payment and preparation, where context often has to be rebuilt from scattered messages.

The workflow should make the next action visible after each step. This prevents the owner from relying on memory and reduces missed handoffs.

Critical handoff	Payment to intake review
Primary risk	Starting delivery without enough structured context.

Repeated Task Map

Repeated work includes explaining the same preparation instructions, checking whether intake answers are complete, summarizing client context, drafting workshop notes, and sending follow-up actions.

The first improvement should be a structured intake summary and a follow-up note draft. These are useful, low-risk places for AI assistance because a human can review them before sending.

Repeatable input	Client goals, current process, deadline, constraints, and desired result
Repeatable output	Preparation summary and follow-up action note.

AI-Assisted Opportunities

Use AI to summarize intake answers, turn meeting notes into action points, and prepare a draft follow-up message. Keep the owner responsible for final decisions, client promises, and anything that changes scope or price.

Avoid using AI to approve client fit, make professional claims, or send messages without review. The useful role is draft support and workflow clarity, not autonomous delivery.

Good use	Draft summaries and follow-up notes for review
Do not automate	Fit approval, pricing decisions, promises, or final client communication.

7-Day Workflow Path

Day 1: list each step from enquiry to follow-up. Day 2: name the input needed at each step. Day 3: decide who owns each step. Day 4: create the intake summary template. Day 5: create the follow-up note template. Day 6: test the map on one past project. Day 7: revise the map and remove one unnecessary handoff.

The goal is not to build a complex tool stack. The goal is to make the repeated service easier to run and easier to review.

Decision rule	Keep only workflow steps that reduce confusion, missed context, or repeated manual writing.
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Implementation Priority

Start with the intake summary because it sits closest to the biggest friction point. A clean intake summary improves preparation, delivery, and follow-up without changing the offer itself.

After the map works for one service, consider building a small template library. Do not add more software until the manual map is clear enough to repeat.

Scope note	SoloHatch reports are self-guided workflow decision-support products generated from submitted answers. They are not legal, financial, medical, or professional advisory services. Results are not guaranteed.
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