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1. Purpose & Intended Outcome

Clarify what the work is for before deciding how to produce it.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Make the intended use, audience, outcome, boundaries, and success conditions visible.
Use when	the request is broad, several products could satisfy it, or the work is expanding before its purpose is clear.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 1.A–1.C

Task / Opportunity	Audience / Intended Use

Key questions	• Who will use the result, and for what decision or discussion? • What should be different after the result is used? • What is explicitly outside the purpose?
Key considerations	• Evidence of need • Audience context • Scope / service boundary • Consequences of success
Possible next moves	• Narrow the outcome • Clarify the audience • Set a boundary • Define a small test

Evidence of Need / Sources

Accepted Purpose / Intended Outcome

Reconsider When / Learning

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2. Situation–Problem–Decision Framing

Separate what is happening, what makes it difficult, and what requires a choice.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Keep observation, problem framing, and decision from collapsing into one premature solution.
Use when	the work is moving quickly toward a solution, the problem keeps changing, or several decisions are being mixed together.
Book / Guide reference	The AI-Enabled One-Person Firm — Chapter 5; Practitioner Field Guide 1 and 6
Situation / What Is Happening	**Problem / Relationships Creating Difficulty**
Key questions	• What is present now? • Which relationships make the situation problematic? • What decision is actually required now?
Key considerations	• What is known vs inferred • Dependencies • Consequences • What would change the framing
Possible next moves	• Gather missing context • Reframe the problem • Identify alternatives • Defer or escalate a decision
Decision Space / Alternatives	
Decision / Direction	

What Changed in the Situation or Problem?

3. Function & Contribution Map

Make the work visible before assigning people, AI, software, or tools.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Identify the functions and contributions required for an accepted outcome.
Use when	a broad assignment hides where work is failing or a new tool is being considered before the need is clear.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 2; Function / Contribution Record 2.E
Outcome / Deliverable	**Current Gap / Difficulty**

Functions / contributions in the work

Function / Contribution	Current Executor	Authority / Check	Gap / Next Experiment

Key questions	• Which functions must exist for the outcome to be useful? • Where does the current difficulty sit?

Key considerations	• One executor may serve several functions • Several executors may support one function • Acceptance remains distinct from production
Possible next moves	• Clarify a function • Move a contribution • Add a check • Test a different executor

Governing Sources / Constraints

Current Arrangement Decision

Learning / Next Trial

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4. Capability Allocation & Counterbalance

Allocate contributions by fit, authority, evidence, and consequence—not by category.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Compare human, AI, software, records, reviewers, and outside expertise for the work actually required.
Use when	the owner is carrying too much, a function lacks a dependable home, or another perspective may reduce uncertainty.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 3.A–3.D
Function / Contribution Under Review	**Current Executor / Arrangement**

Allocation comparison

Candidate Capability	Strength for This Work	Limitation / Risk	Check / Authority Needed

Key questions	• What capability is needed here? • What consequence follows from error? • What counterbalance would add distinct evidence or perspective?

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Key considerations	• Human and AI limitations both matter • Second opinions are not votes • Every contributor adds coordination demand
Possible next moves	• Retain human judgment • Delegate bounded work • Add deterministic checking • Seek specialist input

Evidence Supporting Allocation

Allocation Decision / Authority

Condition for Reallocation

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5. Assignment / Handoff

Give the next executor enough current direction to proceed without reconstructing the whole history.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Make purpose, governing material, permitted work, retained decisions, and return expectations explicit.
Use when	another person, AI, or tool is taking work forward and clarification or reconstruction keeps returning to the owner.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 4; Assignment / Handoff Record 4.C
Assignment / Required Result	**Executor / Recipient**
Key questions	• What current material governs? • What may be done without another decision? • What must return for review or acceptance?
Key considerations	• Capability ≠ authority • Source role and access • Independent work that can continue • Acceptance criteria
Possible next moves	• Supply current sources • State permissions • Define escalation • Specify the review package
Governing Material / Evidence	
Retained Decisions / Return Criteria	

Handoff Result / Follow-up

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6. Source & Evidence Check

Match the check to the claim, source role, scope, and uncertainty.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Preserve traceability and determine what the evidence can—and cannot—support.
Use when	a draft looks convincing but source status, support, currency, or comparability is uncertain.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 5.B–5.D

Claim / Question Under Review	Intended Use / Audience

Evidence trace

Claim / Finding	Source / Version	Population / Period / Scope	Support / Gap

Key questions	• Does the source establish the claim? • Is the source current for this question? • What limitation could change interpretation?

Key considerations	• Publication date vs observation period • Governing source vs evidentiary source • Representative scope • Missing or revised sources
Possible next moves	• Narrow the claim • Seek another source • Preserve uncertainty • Escalate unfamiliar evidence

Key Evidence / Citations

Evidence Judgment

Recheck / Update Trigger

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7. Quality / Acceptance

Make clear what was checked, what remains uncertain, and what exact version was accepted.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Separate production quality, evidentiary confidence, interpretation, and final acceptance.
Use when	work is consequential, multiple checks are involved, or later correction must be traceable to the accepted version.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 5; Quality / Acceptance Record 6.D
Item / Version Under Review	**Audience / Intended Use**

Quality and acceptance status

Check / Question	Method / Reviewer	Result / Finding	Action / Status

Key questions	• What uncertainty did each check address? • What did the check establish? • What remains for judgment or acceptance?

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Key considerations	• Polished wrongness • Human reviewer fallibility • Counterbalance purpose • Delivered version vs later knowledge
Possible next moves	• Correct and recheck • Seek counterbalance • Hold affected work • Accept identified version

Unresolved Evidence / Exceptions

Acceptance / Authorization

Correction / Update Trigger

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8. Exception / Escalation

Return uncertainty so someone can act without stopping unrelated work unnecessarily.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Describe the smallest consequential decision, its evidence, dependency, and safe independent work.
Use when	a conflict, missing permission, evidence gap, or consequence exceeds the executor's authority.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 6.A–6.C
Affected Deliverable / Task	**Exception / Conflict / Missing Authority**
Key questions	• What is established? • What remains unresolved? • What work depends on the answer? • Who can decide?
Key considerations	• Hold only dependent work • Evidence vs inference • Smallest decision needed • Consequences of proceeding
Possible next moves	• Request information • Seek specialist review • Preserve uncertainty • Escalate decision
Governing Source / Evidence	
Decision Returned / Direction	

Dependent Work Updated / Rechecked

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9. Learning / Correction / Reconsideration

Preserve the lesson that changes future work without turning history into permanent instruction.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Capture scoped corrections, changed understanding, accepted examples, and reconsideration conditions.
Use when	the same correction recurs, an assumption changes, or prior guidance risks governing new work automatically.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 7.A–7.D
Experience / Observation	**What Changed in Understanding**
Key questions	• What should change next time? • Why does the correction matter? • What should remain historical rather than current guidance?
Key considerations	• Reason and scope of correction • Human learning • Status of superseded material • Conditions that could change again
Possible next moves	• Update guidance • Preserve accepted example • Label history • Set reconsideration trigger
Evidence / Example Supporting Change	
Accepted Learning / Current Guidance	

Reconsider When

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10. Commitment Decision

Decide what deserves continuing resources before a useful experiment becomes an obligation.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Separate active work, bounded experiments, parked options, and alternatives.
Use when	a useful capability creates attractive extensions or the continuing burden of success is becoming visible.
Book / Guide reference	The AI-Enabled One-Person Firm — Practitioner Field Guide 8.A–8.E
Opportunity / Initiative	**Current Status / Existing Commitment**
Key questions	• What purpose does this serve? • What continuing work appears if it succeeds? • What would this displace? • What evidence justifies continuation?
Key considerations	• Demand vs sustainable value • Rights / confidentiality • Owner attention • Maintenance and support
Possible next moves	• Commit • Run bounded experiment • Narrow / phase • Defer / park • Stop / retire
Evidence / Dependencies	
Commitment Decision / Boundary	

Continuation / Reconsideration Condition

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11. Portfolio / Founder Attention Review

Look across commitments before accepting another one.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Make shared dependencies, recurring owner demand, and competing commitments visible together.
Use when	individual projects look manageable but the combined portfolio is consuming attention, review, or maintenance capacity.
Book / Guide reference	The AI-Enabled One-Person Firm — Chapter 6; Appendix A
Review Period / Portfolio Scope	**Founder Capacity / Intended Working Life**

Portfolio snapshot

Initiative	Status	Owner Demand After Delegation	Dependency / Next Decision

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Key questions	• Where is owner attention the common constraint? • Which work shares capabilities? • What new commitment would displace?
Key considerations	• Delegation is not attention-free • Experiments need end decisions • Parked ≠ unfinished • Stopping can release capacity
Possible next moves	• Finish / continue • Combine • Delegate • Defer / park • Stop / retire

Portfolio Evidence / Constraints

Portfolio Decision / Priority

Next Review Trigger

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12. Seven-Test Assessment

Use separate lenses to reveal consequences a single score would hide.

Date / Time	Project / Initiative	Record / Tracking No.	Status / Version

Purpose	Examine utility, efficiency, effectiveness, fairness, legitimacy, adaptability, and sustainability before deciding what changes.
Use when	a capability or service is working but its broader value, burden, trust, adaptability, or sustainability is uncertain.
Book / Guide reference	The AI-Enabled One-Person Firm — Chapter 5; Practitioner Field Guide 8.B
Capability / Service / Commitment	**Assessment Period / Decision Ahead**

Assessment lenses

Assessment lens	Evidence / Observation	Concern / Tradeoff	Implication for Next Decision
Utility Is it useful to the people it is meant to help?			
Efficiency Is the value worth the time, money, and attention used?			
Effectiveness Is it producing the result that justified the effort?			
Fairness Are benefits, burdens, and access acceptable?			
Legitimacy Does the arrangement earn necessary trust and support?			

Adaptability Can it change when conditions change?			
Sustainability Can it continue within the available capacity and intended working life?			

Key questions	• Which test could change the next decision? • Where does strength in one area conceal weakness in another?
Key considerations	• No total score • Use evidence appropriate to each test • Assessment is part of learning • Conditions change
Possible next moves	• Continue • Improve specific weakness • Run a bounded test • Reframe / reconsider commitment

Most Important Evidence / Gaps

Assessment-Informed Decision

What to Watch Before Next Review