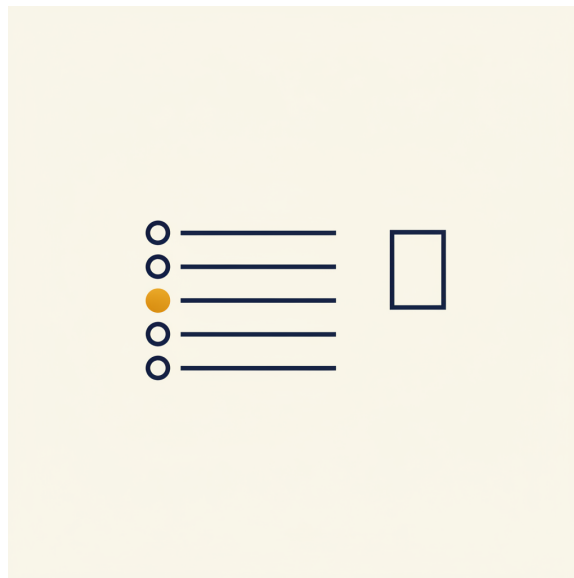




TIER 2 - WORK APPLICATION * V1.0 -- MAY 2026

FOR DOCUMENTATION AND SOP WRITING

How to turn verbal explanations into written processes that actually get followed. The voice-dictation
-> AI-structure workflow, the SOP catalog pattern, and the limit on what AI can do without ever
being in your shop.



BY

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Small-business owners, team leads, and operators who know HOW they do things but
have never written it down -- and are tired of training every new hire from scratch

15-20 minutes

Free. Forever.

EDITION

AUDIENCE

READ TIME

COST

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SECTION 1

Knowledge in your head is a single point of failure

"I'm the only one who knows how to do this"

If you run a small business or lead a small team, you've said something like this in the last six months:

- "I'm the only one who knows how to handle [specific situation]"
- "It's easier if I just do it myself than train someone"
- "I tried writing it down once but never finished"
- "Every new hire takes 6 months to ramp because there's no documentation"

The pattern is the same: critical know-how lives in your head, doesn't get written down, and the business hits a ceiling because YOU are the bottleneck. The fix everyone talks about is "write SOPs" (standard operating procedures). The problem with that fix is that nobody actually writes them -- they're too tedious, the writing voice is wrong, and even the SOPs that DO get written often go unread.

AI changes the shape of this. Not because AI writes the SOP for you -- it can't; it doesn't know your shop's actual quirks. AI's job is to turn YOUR explanation (verbal, rambling, in real time) into a structured document people can actually use. This module is the workflow.

What you'll have by page 13

By the end of this primer:

- The **voice-dictated** SOPs you've written previously took you 4 weekends.
- The **SOP catalog** is complete enough.
- The **followable** SOPs are ready to use.
- **Three worked sessions** -- a process SOP, a checklist, a decision tree.
- The **honest list** of what you need to do next.

The SOP that doesn't exist costs you every new hire, every vacation, every time you're sick. AI doesn't write the SOP for you. It just removes the friction so you actually finish the writing this time.

SECTION 2

The voice-dictation workflow

The single highest-leverage move in this whole module.

The voice-dictation SOP workflow:

Step 1 -- Record yourself explaining the process out loud (10 min). Pretend you're training a new hire. Walk them through how YOU do this task. Voice memo on your phone. Don't try to be organized; just talk through it. Cover edge cases, decisions, the parts that are "just feel."

Step 2 -- Transcribe + restructure (5 min). Upload or paste the transcript into AI:

"Below is a verbal walkthrough of how I do [task]. Turn it into a structured SOP a new employee could follow. Sections: Overview / Inputs Needed / Step-by-Step (with sub-steps) / Common Mistakes / When to Ask Me. Use my voice from the transcript -- don't smooth it into corporate-speak. Flag anywhere I was unclear, contradicted myself, or skipped a step."

Step 3 -- Edit + verify (5 min). Read the output. Add what you missed. Fix the parts that read wrong. Save.

Total: 20 minutes per SOP. The same SOP, written longhand from scratch, takes 2-4 hours and usually never gets finished.

Why voice-first

Most people can't sit down and "write an SOP" because writing the steps in order requires you to consciously construct the workflow -- which is harder than running the workflow. Talking through it, you fall into the actual sequence naturally.

The transcript is messy. AI's structuring step is what makes it usable. The combination is what makes it fast.

SECTION 3

The SOP catalog pattern

What to document first

Don't try to write all your SOPs in one weekend. You won't finish. Use this prioritization:

SOP priority ladder:

1. **The processes that BLOCK other people from doing work** -- anything where someone has to wait for you to handle a task before they can do theirs. Highest-value SOPs.
2. **The processes that BREAK if you're not there** -- what falls apart on your vacation week, your sick day, your long lunch. Second priority.
3. **The processes that REPEAT often** -- daily, weekly, monthly tasks that someone could do if they knew how. Third priority.
4. **The processes that take a long time to TRAIN** -- anything where you spend 2+ hours explaining to each new hire. Fourth priority.
5. **Everything else** -- defer until you have time, or never. Most "SOPs" companies write are in this category and never get used.

Build the catalog by writing one SOP per week from priority 1, then 2, then 3. In a quarter you have 12-13 SOPs covering most of your bottleneck. That's enough to fundamentally change the business.

What "good enough" looks like

An SOP doesn't need to be perfect. It needs to be followable. The minimum viable SOP:

- 1-2 paragraph overview
- A clear list of what's needed before starting
- Numbered steps in the right order
- 2-3 sentences on common mistakes

- A "when to escalate to me" line

That's it. ~500-800 words. Half-page to a page printed. Don't aim for the 40-page corporate SOP template -- it'll never get finished and won't get read if it does.

SECTION 4

The followable test

After you write an SOP, test it. Not by reading it yourself -- by having someone else try to follow it.

The followable test:

Hand the SOP to someone who's never done the task before. Tell them: "Try to do this from the document alone. Don't ask me questions unless you're truly stuck. When you get stuck, write down WHERE in the SOP you got lost."

Two outcomes:

1. **They finish without asking questions** -> the SOP works. Done.
2. **They got stuck at specific points** -> those are the gaps. Go back to the SOP and fix THOSE specific points. Don't rewrite the whole thing.

The followable test is the single best quality check for any SOP. The version that survives this test is the version that's actually useful.

Common gaps the test surfaces

- **Unstated assumptions.** "Open the spreadsheet" -- which spreadsheet? Where is it?
- **Skipped steps.** "Then save the file" -- but where, with what name?
- **Decisions disguised as steps.** "Pick the right option" -- what's the right option for case X vs case Y?
- **Vocabulary that's local to YOU.** "Check the rough-in" -- what's a rough-in? Defined somewhere?

Each gap closes in 2 minutes. The SOP improves quickly. By the third hire who uses it, it's solid.

SECTION 5

Three worked sessions

Worked session 1 -- Process SOP (estimating a residential project)

You estimate ~5 residential projects a month. The process is mostly in your head; new estimator-in-training takes weeks to get up to speed.

Step 1 (recording, 12 min): "OK so when a lead comes in, the first thing I do is check whether it's in our service area. If it's outside [radius], I usually politely decline... [continues talking through your full process including site-visit prep, measurement protocol, your standard markup conversation, etc.]"

Step 2 (AI structuring):

"Below is my verbal walkthrough of how I estimate a residential project. Turn it into an SOP a new estimator could follow. Sections: Overview / Inputs Needed / Step-by-Step / Common Mistakes / When to Ask Me. Keep my voice. Flag where I was unclear. [paste transcript]"

Output: a 2-page SOP. You add a couple of links to your standard estimating spreadsheet, fix one section where the AI smoothed a critical detail. Final time: 25 minutes total. You now have an SOP that takes a new estimator from 6-week ramp to 1-week ramp.

Worked session 2 -- Checklist SOP (job-site close-out)

Every project ends with a punch list and a close-out. You've been doing it consistently for years but it lives in your head.

Recording (8 min): "When we close a job out, I walk every surface room by room. First the kitchen -- I check the cabinet alignment, the door swing, the toe-kick, the crown molding return... [continues through every room and every surface check you do]"

AI structuring:

"Below is my close-out process. Convert to a printable checklist. Group items by room. Each item should be a single checkable line. At the bottom, add the standard 'client walkthrough script' for what I say to clients during the final walk. Keep my voice. [paste]"

Output: a 1-page checklist your foreman can print and hand to the team for every close-out. Same quality as the version you would have done; consistent across jobs even when you're not there.

Worked session 3 -- Decision-tree SOP (when to bill a change order)

The hard kind. Not a linear process -- a decision framework. "When should we bill a change order vs absorb the change as a courtesy?"

Recording (15 min): You talk through 4-5 real examples from the last year. "On the Henderson project they asked for X -- I billed it because Y. On the Williams project they asked for Z -- I absorbed it because W..."

AI structuring:

"Below is me talking through 4-5 real examples of change-order decisions. Pull out the decision principles I'm using -- the factors that determined whether I billed vs absorbed. Structure as a decision tree or a 'consider these factors' framework. Then list the 3-4 specific situations where the answer is always one way or the other (always bill / always absorb). Keep my voice. [paste]"

Output: a decision framework + a short list of always-bill / always-absorb scenarios. Your foreman can now make this call without escalating to you on 80% of cases. The 20% that warrant a call to you actually warrant the call.

SECTION 6

The honest limit

Three things AI cannot do for your SOPs:

- **AI doesn't know your shop's specific quirks.** Your supplier discount, your subcontractor's habits, the customer-type that always escalates -- AI doesn't know any of this until you tell it. If you don't put it in the SOP, the SOP won't have it.
- **AI smooths edges.** The version of "be patient with this customer because they always second-guess but always pay" comes out of AI as "communicate professionally with patient and detail-oriented customers" -- which is worse and less actionable. Re-read the AI output for places where YOUR specific wisdom got generalized into generic advice. Put your wisdom back in.
- **AI can't capture institutional memory.** "We tried that approach in 2022 and it failed because [story]" -- AI can write the principle but it can't carry the story. The reason the principle exists has to come from you. For high-stakes SOPs, include the story.

Within those limits, AI-assisted SOPs are the fastest reliable way to get documentation out of your head and into a form people can use. The cumulative business impact compounds fast -- every new hire ramps faster, every vacation is less stressful, every "I'm the only one who can do this" problem starts to dissolve.

SECTION 7

When NOT to write an SOP

Three categories:

- **Processes that only happen 1-2 times a year.** Not worth documenting unless they're high-stakes. The "I'll figure it out again" version is fine for rare events.
- **Processes where the person doing it is going to be there for years.** If your bookkeeper has been with you for 10 years and isn't going anywhere, the bookkeeping SOP is lower priority than the SOPs for roles that turn over. Spend the time where the documentation has real ROI.
- **Skills, not processes.** "How to be a good salesperson" isn't an SOP -- it's a skill. SOPs document REPEATABLE PROCESSES. Skills require training, mentorship, and practice. Don't try to compress them into a document.

SECTION 8

Where to go from here

Seven more modules in Tier 2:

- **AI for project management** -- status updates, scope creep, timeline negotiation, retrospectives.

Get the next module the day it drops: theaguywi.com/training

If you want this SOP-building workflow installed across a small business -- the catalog prioritized, the voice-dictation pattern trained in, the documentation built out over a quarter -- that's the consulting offer.

Reach out: alexanderjahn79@icloud.com

Closing -- the lock-in line

The SOP that doesn't exist costs you every new hire. AI doesn't write it for you. It removes the writing friction so you actually finish this time. Voice-dictate, AI-structure, followable-test, save. 20 minutes per SOP. Build the catalog over a quarter. Watch the business change shape.

20

Twenty minutes

per SOP, from blank to followable. One per week for a quarter. 12-13 SOPs that cover the bottleneck processes in your business. Compared to the alternative -- none of them -- the math is obvious.

-- Alex

Agent Logic --

Lac, WI. This is module 11 of 18 in Tier 2 (Professional).

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