LoftyBiz Helper Map Worksheet

List each role, one weekly task, who checks the helper, and the time before and after. If you have a team, start the one-week challenge on Monday.

From LoftyBiz 149 — AI Helpers for a Small Team: Research, Qualifying and Admin. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

This week's task

List each role on your team. Next to each, write one task that role repeats every week. Choose one for a helper, name the person who will check its output, and time the task before and after. If you have a team, start the one-week challenge on Monday. Put those roles, tasks and checker names into Systex, so the whole team can follow the same steps.

Your helper map

The amber rows are examples from the video (Hollis in Provo, Yuki in Topeka), not promises. Replace them with your own roles and times.

Role	Repeated weekly task	Helper this week?	Who checks	Minutes before	Minutes after
Recruiter (example: Hollis's team)	Prepare a one-page brief before a hiring-company call	Yes	The recruiter who will make the call	Close to an hour (example)	About fifteen minutes per call (example)
Office manager (example: Hollis's team)	Turn internal meetings into a summary and a task list	Yes	The office manager	Hours each week (example)	Your figure
Your role					
Your role					
Your role					
Your role					

In Hollis's example, prep time dropped to about fifteen minutes per call, and the team saved several hours each week, mostly from research and notes. Your figures will depend on your work and how carefully you set things up.

One-week challenge rules

Rule	Your note
1. Pick something you do at least weekly	
2. Write down how long it takes now	
3. A person must check every result before it goes to a client or a supplier	
4. No private customer details go into a tool unless the business has agreed it is allowed	

Challenge log (Yuki's sheet)

In Yuki's example, three of the eight ideas saved enough time to keep. Keep the winners. Drop the rest. Then run the challenge again the next quarter, with a new task each.

Task	Owner	Minutes before	Minutes after	Who checks	Keep?
Draft follow-up emails after a venue visit (example)	Sales lead	Your figure	Your figure	The sales lead	Your decision
Turn supplier quotes into a comparison table (example)	Planner	Your figure	Your figure	The planner	Your decision
First drafts of event-day schedules from notes (example)	Coordinator	Your figure	Your figure	The coordinator	Your decision
Draft the agenda for the weekly team meeting (example)	Yuki	Your figure	Your figure	Yuki	Your decision

One-page helper instructions

Before any helper goes live, write what it should do, what it must never do, and what to hand to a person. Every helper has a named person who checks its output. AI drafts. A person approves. Fix a messy process before you automate it.

Instruction	Your note
What it should do	
What it must never do	
What to hand to a person	
Named person who checks its output	
Review date (look at a few examples together each week)	

Before anyone paid for a new tool, Yuki's team had to show the time it saved in the sheet, and the team agreed which tools were approved.

Example figures, not targets or a forecast. General education, not technical, legal or HR advice. Results vary. These are examples, not promises.
Put the finished map, the winning tasks and the checker names into Systex, so the whole team can follow the same steps. Systex is our own product. You can find Systex at loftybiz.net, or click the link in the description.