LoftyBiz Six-Box Org Chart Worksheet

On a blank page, draw six boxes: sales, marketing, delivery, operations, finance and people. Write one owner's name in each box. Then circle any box with no owner, and any box with no one who has done this work well before. Those circles are your next decisions. Share the page with your team and ask what you missed.

From LoftyBiz 164 — Organise the Work, Not the People: A Simple Org Chart. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

The six boxes

Function	What this box does	Owner (one person)	Has someone done this well before?	Circle? (no owner / no experience)
Sales	Winning new clients			
Marketing	Making sure the right people know you exist			
Delivery	Making and serving the work (in a catering firm: making and serving the food)			
Operations	Buying, scheduling, equipment and the day-to-day running of the work			
Finance	Invoices, payments and cash			
People	Hiring, training and pay			

Write one owner in each box. Not who helps, but who is the one person responsible for results there. Circle any box with no owner, and any box with no one who has done this work well before. Those circles are your next decisions.

Official worked examples (not promises)

Example	What the chart showed	What they did	Figures in this example
Harriet's catering company in Des Moines (USA) — twenty-two people after six years	Eleven people reported to her directly. Sales and marketing had no owner. Operations had willing people, but not experience.	First hire was an experienced operations lead, not another cook. Sales went to a trained event coordinator. Marketing stayed with Harriet, written on the chart. Direct reports dropped from eleven to five.	Operations lead: about 62,000 dollars a year. Weekly schedule published every Thursday. Direct reports: 11 → 5.
Ikenna's landscaping firm in Columbus (USA) — a new contract of about twice the work	Delivery was the gap, but finance and people were thin too. Nobody had run payroll for forty people, or hired more than two people at once. His first plan had four layers of managers.	He split hiring into three waves over three months, brought in a part-time experienced people manager, and kept the chart flat: crews of five or six, one operations manager, then him.	Part-time people manager: about 30,000 dollars a year for two days a week. By midsummer, new sites on schedule and most new hires still with the firm. The third wave had two people leave in the first month.

These figures are illustrations, not forecasts. A chart does not fix a business on its own, and no chart can promise you a smooth season.

This week's task

Step	Done?	Notes
Draw six boxes: sales, marketing, delivery, operations, finance and people		
Write one owner's name in each box		
Circle any box with no owner		
Circle any box with no one who has done this work well before		
Share the page with your team and ask what you missed		
Put the page into Systex, so the whole team can follow the same steps		

Example figures, not targets or forecasts. General education, not financial, legal, HR or tax advice. Results vary. These are examples, not promises.

Put this page into Systex, so the whole team can follow the same steps.