

STEP NAME ..... WORKFLOW ..... OWNER .....

## Intent

### WHY

Why this step exists – and what breaks if you remove it.

**ASK** What problem does it solve? · What risk does it reduce? · What uncertainty does it remove? · If you remove it entirely, what breaks?

## Inputs

READY

### 1 Required Information

Names, IDs, terms, pricing, history, specs.

### 2 Required Artifacts

Contracts, forms, diagrams, photos, templates.

### 3 Required Access

Logins, permissions, systems, environments.

### 4 Required Conditions

Approvals, dependencies, prior step done, triggers.

### 5 Required People

Owners, reviewers, approvers, contacts confirmed.

## Execution

WHAT · HOW · WHERE

### WHAT

The bounded work that happens – clean start, no guesswork, decisive end.

### HOW – EXECUTION MODE

1 Human

2 Guided

3 AI-Assisted

4 AI Agent

5 Autonomous

6 External

### WHERE

System, application, or physical location.

### NOT IN SCOPE

Prior / next-step work and “while I’m here” creep.

## Outputs

DONE

### 1 Updated Information

Fields, notes, logs – will the next step know?

### 2 Produced Artifacts

Reports, documents, captures to hand off.

### 3 System State Change

Status, stage, flags the system must reflect.

### 4 Commitments Made

Follow-ups, deadlines, decisions, SLA started.

### 5 Ready Output for Next Step

The handoff packet – no hunting, no asking.

## Impact

### SO THAT

A statement of consequence – what this step enables next.

**THIS STEP COMPLETES SO THAT** the next step can begin · a decision can be made · a risk is reduced · a commitment can be honored · a clock can start.

## FIELD 01 — INTENT

## Write the “why” before the work

Most process documentation starts with “**Step 1: do this thing**.” That’s the wrong starting point. Before you define what happens, answer why the step exists at all. Intent is the top bookend of the canvas — it prevents activity for activity’s sake.

## THE QUESTION TO ASK

“Why does this step exist? What breaks if we remove it?”

- What problem does this step solve?
- What risk does it reduce?
- What uncertainty does it remove?
- Who is surprised if this step is skipped?

If you can’t answer those, the step might be:

**ACCIDENTAL** Exists out of habit, not necessity.

**REDUNDANT** Duplicates work done elsewhere.

**HIDDEN** Doing important work no one has named.

**Try it now.** Pick one step from any operation in your business. Write two sentences: why it exists, and what breaks without it.

## The five elements of a complete step

ELEMENT	LABEL	FILL WITH
Intent	WHY	Purpose, risk reduced, value created
Inputs	READY	Information, Artifacts, Access, Conditions, People
Execution	WHAT · HOW · WHERE	The bounded work, its mode, its location
Outputs	DONE	Updated info, artifacts, state, commitments, handoff
Impact	SO THAT	What this step enables downstream

## The six execution modes

MODE	WHO PERFORMS	EXAMPLE
1 Human	Person does the work	Sales negotiation, escalation
2 Guided	Person + checklist/template	Site survey, proposal from template
3 AI-Assisted	AI drafts, human approves	AI drafts email, CSM reviews
4 AI Agent	AI executes, human supervises	Agent classifies & routes tickets
5 Autonomous	System, no human	Auto-invoice on job complete
6 External	Outside party	Customer sends docs, city issues permit

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