SOP Success

Writing Standard Operating Procedures Workbook and Templates

By Jennifer Henczel

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SOP Success: Writing Standard Operating Procedures Workbook and Templates

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"A short pencil is better than a long memory"

An old saying

What are Standard Operating Procedures?

Standard operating procedures (SOPs) are written instructions that outline and standardize procedures within your company. SOPs are used in every industry in order to keep business practices in accordance with legal, financial, and industry regulations.

In more common language, SOPs are how-tos that cover every aspect of your business. For example, a manufacturing company will have step-by-step manuals for running its machines. Businesses have customer service guides that outline how to deal with customer complaints. Tech companies have troubleshooting guides for when their systems don't work. An SOP can be anything from a detailed written manual with diagrams to a simple picture that shows where a specific item goes in a warehouse.

Why Your Company Needs SOPs

SOPs are essential to any organization, whether you're a small startup with a handful of employees or a giant corporation with many branches and departments. Here are the reasons SOPs are so important:

- **Maintaining Quality Standards:** SOPs ensure that every employee is on the same page when it comes to production, marketing and sales, and customer service. This ensures a consistent standard of quality throughout your company. Tasks can be easily delegated to any employee.
- **Troubleshooting:** When problems arise in your business's daily operation, SOPs provide you a roadmap for troubleshooting. Manuals describe how to diagnose and solve problems so that any employee can do it.
- **No Guesswork:** When you have clearly spelled out procedures, this prevents your employees or yourself from making emotional or rash decisions. Problems and conflicts can be solved fairly with no guesswork.
- **Reduced Learning Curve and Errors:** SOPs allow you to train new employees easily. There's less of a learning curve for them. As they learn about your business, they'll make fewer errors. They can then settle into your company more quickly.

- **A Safe, Healthy Environment:** Since your SOPs put you in compliance with all safety and health regulations, they ensure a healthier, safer workplace. They also protect your company legally in cases of liability.

- **Government Regulations:** SOPs keep you in accordance with regulations and laws. They're easy to update when laws change. If there is a sudden inspection of your company, everything will be in order. Clients and customers may also investigate your company, and if you can show them this documentation, it helps to engender trust.

- **Financial Considerations:** Your SOPs make managing finances, handling bookkeeping, and filing taxes much easier.

- **More Value for Your Company:** All of the above benefits offer a further benefit for your company – they make your company more profitable by making it more efficient. This in turn adds value to your company which is passed on to clients and customers. This added value helps if you choose to sell the company in the future, and it helps you secure funding when you need it. Financial lenders nearly always look at SOPs when considering a company for a loan.

- **SOPs Make Your Company More Dynamic:** It's easy to change company procedures and regulations when they're all well documented and easily accessible to your employees.

SOPs Can't Cover Everything: SOPs differ from one business to another even within the same industry. However, your standard operating procedures can't cover everything completely (although they should strive to). Because of this, make sure everyone in your company has a good understanding of company vision, mission, and values so that they can make the right decision when one needs to be made.

Consider these scenarios:

- You just hired a new employee or freelancer. You hand them a checklist and process to follow. You then follow your own checklist to make sure they have all the information they need.

- You start increasing your production of products to twice what you had before. However, they all have the same high quality since you have a clear process that each person involved must follow.

- Someone offers to buy your company tomorrow and you just access a few files and folders to put together the financials you need for negotiation.
- A customer calls asking about a problem they're having. Your customer service desk asks them a set of questions to determine exactly what the problem is, resolving it within minutes.

These are all examples of situations where a standard process or checklist can make the difference between chaos and efficiency. Standardizing certain aspects of your business not only ensures consistency of quality and service, it also gives you peace of mind.

This report is designed primarily for small business owners and managers, as well as those managing outsourcers, and those who are new to the whole concept of standard operating procedures.

We won't be covering complicated documents for standardizing things like processes for medical or legal compliance. Check with your lawyer or medical practitioner for any documentation related to your health or legal matters.

"Creativity dies in an undisciplined environment."
Jim Collins

"What gets measured, gets managed."

Peter Drucker

Checklist Manifesto

A checklist is one form of a Standard Operating Procedure. Checklists can be part of any SOP. The checklist may seem like a simple concept, but can make a huge difference in the success and efficient operation of any organization.

The Checklist Manifesto, by Atul Gawande, is full of stories from many different fields, which show how the usage of checklists has saved lives.

Gawande explains that, the reason why checklists work is simple: it's easy for people to forget things. Processes involve multiple steps, and it's common to forget one or two of the tasks. Using checklists ensures that the person implementing the process won't forget anything.

In terms of business development, checklists and SOPS most definitely save time and money. They allow you to greatly increase productivity and profit.

Checklists allow you to direct your resources and brain power towards more important, higher level tasks. Since you don't have to remember all the steps every time, you can spend your time, and staff hours, towards more creative activities. You can delegate and outsource tasks more swiftly.

So, if you want to ensure quality throughout your organization, and get it done right every time, use checklists.

"We always hope for the easy fix: the one simple change that will erase a problem in a stroke. But few things in life work this way. Instead, success requires making a hundred small steps go right - one after the other, no slipups, no goofs, everyone pitching in."

Atul Gawande

Transitioning from Working in Your Business, to Working on Your Business

The act of writing your system down has value, because it helps you think through the steps, standards, and most importantly the results, that you want to achieve. In addition, it allows you to effectively communicate the system to others, for training and succession purposes.

Documenting processes is heavily advocated in the popular business book The E Myth by Michael Gerber (1995). Gerber was one of the first to coin the phrase and express the idea of Working on your business, not just in it. He distinguished between 3 types of people, as it relates to becoming a business owner:

- Technical - A person who is highly skilled at their craft or specialization.
- Manager - A person who is focused on operations.
- Entrepreneur - A person who is the visionary.

Essentially, his text explains that if your desire is to truly transition from working in your business to working on your business, then you must create systems. Systems that are not dependent on you. Your role can be repeated by anyone through proven and reliable systematic processes.

He explores systems that have worked, such as successful franchises, which use systems to repeat success and predictably and efficiently generate revenue. Most importantly freeing up the business owner-YOU-to step into your visionary role. Or if you are a technician at heart, then systems will help you to build a business around yourself that supports what you love to do.

Ultimately, as an entrepreneur you want to build a business that not only produces income for you, but a profitable and sellable business model that produces consistent results, and runs without being solely dependent on you.

Number these in order of which one you feel you are the most. 1 = most like and 3 = least like.

☐ Technical ☐ Manager ☐ Entrepreneur

"Contrary to popular belief, my experience has shown me that the people who are exceptionally good in business aren't so because of what they know but because of their insatiable need to know more." Michael Gerber

The 80:20 Rule

The Pareto principle--also known as the 80–20 rule--states that, for many events, roughly 80% of the effects come from 20% of the causes.

For example:

- 20% of work, produces 80% of your campaign results
- 80% of your sales will come from 20% of your sales force.
- 20% of your customers account for 80% of the sales.
- 80% of a company's revenue is derived from 20% of its products or services
- 80% of your stock comes from 20% of your suppliers.
- 20% of your stock takes up 80% of your warehouse space.
- 80% of the results are achieved by 20% of the group.
- 20% of a company's staff will output 80% of its production.
- 20% of your staff will cause 80% of your problems.

The 80:20 principle was first expressed by Vilfredo Pareto, when he observed a connection between population and wealth. Pareto noticed that 80% of Italy's land was owned by 20% of the population. Upon surveying a variety of other countries, to his own surprise, he found a similar ratio.

This 80:20 split can be seen in many places; marketing, management, economics, software design, quality control systems and many more places. Whilst the rule is called the 80:20 Rule – the actual percentages are not all that important.

The 80:20 principle is easy to understand and apply, yet produces powerful results. It calls for continuous improvement. It causes us to be clear on what we are doing day in and day out. It forces us to identify what activities really generate the income in our organizations. When we pin point what makes the money, we can better manage our time and resources.

We tend to think of innovation as difficult, but with the creative use of The 80/20 Principle innovation can be both easy and fun!" Richard Koch

Which 80:20 principles do you see taking place in your business?

____

____

In this digital world, some modified marketing uses of the 80:20 Rule are emerging:

- 20% working in your business, 80% working on your business.
- Spend 20% of your time on operations, and 80% marketing.
- Spend 20% of you time and resources on traditional outbound marketing, and 80% on inbound marketing.
- 20% of marketing messages produce 80% of your campaign results.

Use 20% of your time to create a good STORY and 80% of your job is done.

What percentage would you say you currently dedicate solely to social media?

Hours per month: ____________________ = ________________________ % of your time

What percentage would you say you currently dedicate solely to email marketing?

Hours per month: ____________________ = ________________________ % of your time

What percentage would you say you currently dedicate solely to implementing inbound marketing overall?

Hours per month: ____________________ = ________________________ % of your time

What percentage would you say you currently dedicate solely to learning about inbound marketing?

Hours per month: ____________________ = ________________________ % of your time

What changes can you make to generate more time towards implementation?

____

____

____

Key areas where SOPs are needed within an Organization

Creating standard operating procedures for your business is all about systematizing and documenting its processes. This should be done for all processes possible in all functions of your business. The basics of your SOPs should be in place before your business begins its operations, though you'll be updating them as your business evolves.

Here are some key areas to consider when setting up a SOP system:

- Legal Operations
- Production and Operations
- Human Resources
- Communications
- Marketing and Sales
- Customer Service
- Computers and IT
- Financial Operations

Legal SOPs

Your legal SOPs guarantee that your company is operating fully within the law. One major consideration to include here is privacy. Outline what information you collect, what you share and with whom, how it is kept private, and measures you take to ensure this privacy. Accessibility is another key area. These SOPs ensure that your company is compliant with laws, such as, access requirements and disaster preparedness. Consult a lawyer, your government, and regulating bodies for creating these SOPs.

Production and Operations SOPs

The steps in producing your products or implementing your services should be outlined in detail in your SOPs. Be sure to include maintenance and inspection of all equipment and tools used. Your standard operating procedures should also include managing files, data, statistics, shipping calculations, and any other information you use. Consult with your manufacturing managers, engineers, and skilled production staff to create these SOPs.

Human Resources SOPs

The human resources department (HR) is an important area of any business where procedures and guidelines need to be clearly laid out. This is the department that handles a variety of crucial tasks, such as hiring new employees, ensuring that employees are happy and able to carry out their jobs, and managing conflicts or problems among employees. HR needs to do all of this in accordance with the organization's vision and corporate culture. All human resources procedures need to be clearly outlined in standard operating procedures.

HR SOPs that relate to employees, are often incorporated into an Employee Handbook, which can also be called an Organizational Policy Guide, Policy Manual, or something similar to that. For example, what to do when an employee needs to call in sick, or apply for benefits, or submitting a vacation request.

The Employee Handbook includes legal, safety, and government regulated employment standards. You can get those from your local government. For example, you can see "A Guide to the Employment Standards Act" from British Columbia here: http://www.labour.gov.bc.ca/esb/esaguide/

There is often overlaps in the required procedures and how you conduct these activities in-house, in order to comply with the applicable laws. In addition to the required employee information, you will also include HR and employee responsibilities, along with information that is very specific to your organization.

HR staff themselves also need SOPs to guide processes that are specific to their department. This results in two separate sets of SOPs, those specifically for HR staff, for processing payroll, recruiting, and employee training, for example. Then the HR Handbook is given to all employees for every area within the organization.

Hiring and managing employees is an area in which detailed SOPs are essential. Start by outlining your recruiting procedures. Include the process of writing and posting ads, contacting applicants, and setting up interviews. Orientation and training of new hires, including manuals and other materials they will receive, should be standardized. Create clear guidelines for performance evaluation, employee conflicts, and corrective action.

Compliance with Regulations

When writing your human resources department SOPs, review government guidelines to make sure you're in compliance with them and include this in your SOPs. The SOPs should clearly show how your organization is in accordance with municipal, provincial, state, and federal requirements, depending on the structure of your country.

Recruiting

One of the human resources department's key responsibilities is hiring new employees. Each step of this process needs to be outlined in SOPs to ensure that the right people are being hired and that they're being treated fairly.

SOPs should outline the writing, placing, and managing of job ads. When an applicant responds to the ads, there must be strict guidelines in place to determine which candidates are called for an interview. If you have more than one person in human resources, there needs to be a system for note-taking so that other employees know whether a person has been contacted or not.

Procedures for interviewing and screening also need to be documented. When and where interviews are conducted, what questions are asked, and management of interview notes all need to be included. Policies for considering applicants, such as background checks, screening, checking references, and checking certifications are all important as well.

Note: Using Psychometric Assessments during the interview process is the best way for documenting candidates' skills, abilities, and aptitudes. These tools can dramatically shorten the recruiting process.

Orientation and Training

Once a new employee is hired, they need to be brought into the company through orientation and training. Orientation includes teaching the new hire about your company's culture and its policies. Materials like employee manuals may be given to them, and they may have to undergo training sessions. How this is done should be included in your SOPs. Even if your company is small and training is somewhat informal, you should put a system in place for tracking new employee progress.

Compensation, insurance, benefits, and payroll policies need be outlined carefully in your SOPs. Be sure to also include how this information is conveyed to new employees.

Employee Progress and Evaluation

Most companies have a system in place for evaluating employees. All of the details of this process should be included in your human resources SOPs. This would include things such as when evaluations occur, who conducts evaluations, how employee performance is evaluated, and how the results are communicated to employees.

Your company's system for promotions and pay raises should also be included in your SOPs. Make sure that these processes allow for some flexibility on the part of managers. This is not an area where your company should be flying on auto-pilot. Your SOPs should allow your managers plenty of leeway. Communication among managers and owners or directors is key.

Firing and Laying off Employees

Termination of employees needs to be clearly documented in your SOPs. If these rules and regulations are in place and clearly spelled out, terminated employees who feel they were treated unfairly will not have a case against your company. Many conflicts of this nature are avoided by having clear SOPs.

Don't count every hour,

make every hour count

Technology SOPs

Practically every company on Earth today relies heavily on computers and the Internet for its regular daily functions. Customer transactions, data management, sales and marketing, product manufacturing, security and backup routines, and nearly every other aspect of business utilize computer technology. Your company needs to have solid standard operating procedures in place to set ground rules and establish guidelines for how this technology is used.

Internet Use Policy

It's likely that most of your employees are using the Internet throughout the day. The Internet is full of bad neighborhoods and distractions. Your company's SOPs need to clearly state what is allowed and what is not allowed at work. For example, casual Internet surfing at certain times throughout the day may be acceptable, but perhaps the use of personal email is not.

Social Media

Create an Internet Use Policy Handbook or Online Communication Handbook that covers all digital marketing, including social media. Include marketing procedures, as well as access and security SOPs and guidelines. In regards to social media, be clear about what sites are part of your marketing and business strategy, and when employees are allowed to access social networks. Determine which social media accounts belong to the employee and which ones belong to the company.

When developing SOPs with security in mind, set restrictions on what files can be downloaded or shared online, not only for the sake of employee productivity, but for company security.

Hardware and Software Management

There are maintenance tasks to keep your hardware up to date and manage any software that your company uses. Some programs need to be evaluated from time to time. Most types of software have occasional upgrades. Your SOPs should outline how these programs are to be maintained and kept running smoothly.

Your hardware and software management SOPs should also include rules about access to software. Certain employees need access to certain programs while others don't. Access considerations should include password management.

Tech Troubleshooting

With computers, things inevitably go wrong sometimes. With clear troubleshooting SOPs, any tech-related problem can be handled by any employee. Your company doesn't need its own IT department to handle a vast majority of computer related problems. Create SOPs so that any employee can handle these problems. Flow charts work particularly well for troubleshooting tech problems.

Security Training

Included in either your security or your human resources SOPs (preferably both) should be training for all employees on security processes. This may include a bit of training on computer systems. Employees need to have a basic understanding of how data is kept safe.

Computer and IT Security

Since much of what companies today do revolves around the computer and Internet technology, it is vitally important to make sure all data and networks are safe. Security guidelines should be clearly explained in SOPs. This is important not only for keeping your company safe from attacks, but also for showing potential investors or auditors that you're on top of your security needs.

All security related processes should be covered in your SOPs. This includes things like managing passwords and access, periodically changing passwords, conducting in-company security audits, upgrading security systems, and making improvements to security systems.

Your security procedures should also include what to do if your company's security is breached. If your network is attacked, all of your employees need to know exactly what to do and be able to act immediately.

Financial SOPs

Standard operating procedures should be written to cover every aspect of your company's business, but they're especially important for your business's finances. This includes taking payments, billing, collections, invoices, and tax information. Financial SOPs are especially important because lenders will look at this information when considering your company for loans. SOPs will also make filing taxes much easier.

Financial SOPs need to be clear, detailed, and thorough so that your financial operations are in order. When your company is audited, its SOPs related to finance will be closely inspected. Lenders will also look carefully at your SOPs when considering your company for loans.

Bookkeeping Procedures

All of your company's bookkeeping procedures need to be documented in detail. This includes all expenses, credits, transactions, assets, and liabilities. Procedures should be outlined for creating, reviewing, and documenting budgets.

Payment Policies

How you take payments from customers or clients are an important part of your standard operating procedures. The payment process and any other transactions with third parties, including customers and clients, need to be documented in SOPs.

Management of Account Documents

Make sure that your company's system for managing, organizing, and storing account documents is clearly detailed in your SOPs. These procedures should include all information on how you secure the documents and protect your customers' privacy.

Company Expenses

Financial SOPs should include employee expenses and how they are reimbursed. Your employees need to use company money for travel, supplies, and other work-related expenses. Clarify which expenses are eligible for reimbursement, how your employees get this reimbursement, and how reimbursement records are kept.

Tax Assessments

You need a clear system in your SOPs for recording income and expenses, of course, as well as procedures for storage and management of receipts and other tax documents. Include the steps for filing and preparing for a tax audit.

Financial Reporting and Analysis

Financial reporting is how your company tells the world how it's performing. This reporting chronicles your business's ups and downs. SOPs should clarify how this regular reporting is done and the measures taken to ensure that it is as accurate as possible. You might also include a review process and performance appraisal procedures.

The Importance of Financial SOPs

Even if you have only one person in your accounting department, all financial procedures need to be documented to be compliant with your country's government tax department. Creating financial SOPs ensures that your company is in compliance with all laws and regulations, and allows it to change easily when these laws and regulations should change. Consult an accounting professional for all your financial SOPs.

Non-compliant Financial SOPs

Documents used for planning and budgeting may not be required for submission to the tax department, but they are essential for selling or funding your business along the way. For example, a cash flow forecast can reveal important break even points for projects and for your whole organization.

Marketing & Communications SOPs

It truly is the best time in history to be a small business owner, because marketing opportunities are more accessible and abundant than ever before. But this also makes it a much more formidable area to manage. If you let it, it can easily get out of control.

With marketing tools such as blogs, social media, and email marketing becoming an essential part of any business, documenting your marketing practices is critical. To save time and money, managers should work with lead staff to create SOPs in order to clarify the scope, expectations, objectives, and step-by-step processes involved in any task, before delegating to staff or outsourcers.

Now more than ever, marketing requires the strategic planning skills of a very knowledgeable marketing and communications expert. An expert will help you determine how many hours you actually have per week, and turn those hours into an effective plan of action, utilizing every moment to its fullest.

Marketing and Sales

Marketing and sales are your business's external communications. This area includes things like market research, public relations, press releases, marketing methods, tracking sales, advertising, direct mail, email marketing, social media, online marketing, podcasting, and your website.

It also includes the processes involved with responding to customers or clients about your products or services; preparing sales quotes and proposals, negotiating, and following up. Who handles what, information that must be communicated, and how marketing and sales are tracked should certainly be included in your SOPs.

The key to sales and marketing SOPs, is to make sure your procedures are somewhat structured, while also allowing room for flexibility. You need to ensure you have sales and marketing staff who have the appropriate expertise, in addition to relying on the SOP guidelines.

Customer Service

Customer service is another key area that needs to be standardized to ensure that customers are treated fairly. You may choose to include in your standard operating procedures things like response time to inquiries, delivery time and method of services or products, warrantees, returns and refunds, dealing with customer complaints, and reputation management.

Internal Communications

You need SOPs for handling internal communications in your office and workplace. This includes things like answering and directing calls, and managing emails, and handling client and customer data within the company. Internal communication SOPs can assist smooth interpersonal relationships among staff, and between staff and management.

Social Media

Marketing opportunities are abundant and many business owners are finding the potential volume of social media tasks to be overwhelming. It is important to guard your time wisely. Using SOPs is the key to getting the most out of social media, delegating online tasks appropriately, and avoiding time-wasting activities. See further along in this text for Social Media Checklists.

Finally, in all areas of your organization, you should have a system for ensuring that your SOPs are being followed. SOPs don't help if no one actually reads them. Put a system in place to ensure that your SOPs are being read, and conduct regular audits and reviews to make improvements to them.

"You can get more money but you cannot get more time"

Jim Rohn

Writing Your Standard Operating Procedures

Once you've decided on key areas where your company needs standard operating procedures, it's time to write them. While this seems simple enough, once you start writing, you'll see that these procedures can be quite complex. A bit of planning beforehand makes writing your SOPs much easier.

Start with Status Reports

One strategy for moving your organization towards the idea of documenting processes, is to get yourself and your employees to start creating status reports. Status reports document the tasks that you or your staff currently do on a daily and hourly basis. Status reports can be in point form. Each person documents what they actually do, hour by hour.

Status reports will show you how people are using their time, and help you to determine specific areas that need immediate help, and which areas area already are already well documented.

If you are attempting to move your staff towards a culture of documenting, as well as, being accountable for following new SOPs as they are created, then it is best not to use status reports for discipline—at least not at first. When people start doing status reports, it may uncover things you didn’t expect. First, use it as a measurement and as a means of assessment to improve things, moving towards better and better documentation.

Remember, it will take time for people to become proficient at documenting their work. **As the leader, you must be persistent.** Once it has become routine, take another look, and then deal with any staff deficiencies that need to be fixed or changed.

Do-Confirm vs. Read-Do

As the titles suggest, the Do-Confirm style of SOP or Checklist, is where the doer does the task, and then carefully checks off each completed step to ensure that the procedure was completed in the entire intended manner. This leaves some flexibility in how the person conducts the task, so depending on the task, this is the preferred SOP style usually at a very skilled or expert level. For other tasks, in general those that involve entry or mid-level knowledge, the Read-Do SOP is preferred. For example, upon training a new employee, you give them the SOP to be used as a guide to direct them from step to step throughout a process.

Linear vs. Parallel Tasks

All of the tasks that your SOPs outline should be divided into two categories: linear and parallel tasks. Linear tasks are those that need to be followed in order; first, you do Step A and then Step B, and so on. An example would be negotiating with a client and then invoicing them for the job. Negotiations need to be finished before you can submit an invoice.

Parallel tasks, on the other hand, are those that can be done simultaneously. An example of two parallel tasks would be editing a book while the graphics are being created. They can be done at the same time independently of each other.

Grouping by Skillset

Take all of your tasks and put them into categories by skillset, not by employee position or title. The tasks that are currently being handled by one person may in the future be handled by many people, and vice versa. For example, if you have a content writer who also edits your webinars, these are two different skillsets, even though right now they are handled by one person. Create skillsets that are as narrowly defined as possible.

Writing Steps

Start by breaking down each task into the smallest steps possible. Describe each step in as much detail as possible using simple words. Read back over your steps and imagine you know nothing about the company, or ask someone else to read over what you've written and check for how easily it can be understood.

Here is a basic outline for writing SOPs:

- **Administrative Information**: Who is responsible for reviewing and updating this SOP? When was it last reviewed and updated?
- **Introduction and Overview**: What is the task? What is its goal? What access or tools are required to complete the task?
- **Procedure**: Checklists, key points, and detailed steps to complete the process.
- **Frequently Asked Questions (optional)**: It's a good idea to add a Q&A section as well, in case the SOP hasn't explained every question on the reader's mind.

SOP Templates

SOP Visuals: Add visuals for clarity and to appeal to all learning styles:

- **Illustrations and photos:** Help to explain the text more clearly.
- **Flowcharts**: Good for complex tasks and work flows that require many decisions or troubleshooting.
- **Hierarchy or Steps**: Good visual showing a progression of a task in a snapshot.
- **Alerting Elements:** Elements such as arrows and stars emphasize and establish priorities.

Flowcharts for Decision Making: Flowcharts are a good place to start for brainstorming new SOPs with your team. Flowcharts offer a good in-between option by providing instructions and questions. By answering the given question, the employee is directed to the next set of instructions and questions. These can be objective questions such as, 'Is the valve turned on?' or subjective questions like, 'Does the customer have a legitimate concern?' Questions like the latter allow the employee to use his or her own judgment while still sticking to the procedure.

From there you can create an outline, and then complete the SOP with more details. Flowcharts can also be included in SOPs for clarification and simplification of processes in a visual way.

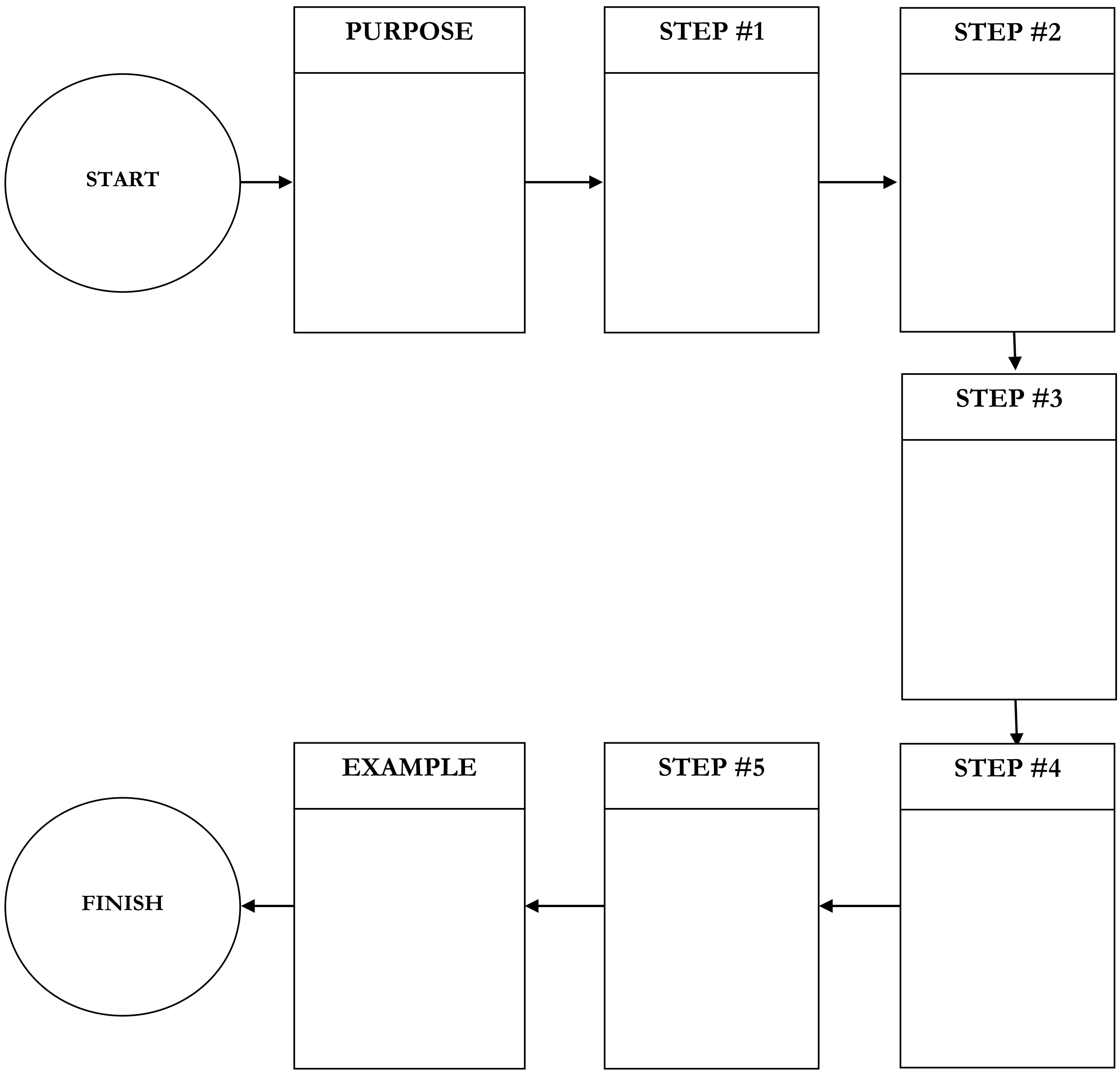
As a business owner or manager, being thorough with your creation and review of SOPs can identify costly gaps and save you time and money in the future. However, keeping each SOP as simple as possible for the end user will ensure that they will be followed properly and regularly. Be as concise as possible, while maintaining quality and accountability.

Below are 2 flow charts and 3 different templates for you to use in your organization. Choose a template that fits with your workflow:

- SOP Flow Chart
- SOP Flow Chart Example
- 1 Page SOP Template
- Step-by-Step SOP Template
- Checklist SOP Template

To get digital copies of these templates and flow charts, visit MarketingMotivator.com.

Work Flow / Flow Chart



Here is an example of a flow chart for a process work flow:

LOGO **1 Page SOP Template [Your Title]**

Created by: ______________________________

Version #, MM/DD/YY ____________________

Approved by: ____________________________

Date of approval: _________________________

SOP Name: Enter SOP Name

Purpose: Enter high level overview of the purpose

Scope: Enter high level description of the scope of the procedure

Definitions:

Sample	An example showing the correct use
SOP	Standard Operating Procedure

Description: 1 Page SOP Template

Procedure:

Step #1:
- Instructions
- Instructions

Step #2:
- Instructions
- Instructions

Step #3:
- Instructions
- Instructions

Attachments:

Step-by-Step Style SOP [Your Title]

Overview
Insert the title of your Standard Operating Procedures document. Use this template as a guide for creating your own. Depending on the SOP you are creating, you may want to add more categories and details. However, for basic SOPs you can probably eliminate some of the sections, or cut them down.

Prepared by
Fill in the name of the original writer of the SOP

Review History
Use the following space to keep track of the review process, people involved and when updates were made.

Date Reviewed	Reviewer	Updates Made?	Approved by
When was the SOP reviewed?	Who reviewed it?	Did he or she make any updates or changes (reviewers should use "track changes" or initial them)	Who made final approval of any changes?

Who this SOP is for
Fill in the roles or titles of people who will be responsible for implementing this SOP. For example, there could be several types of people involved. A process for hiring new graphic designers could require an assistant to place ads, a human resources person to do initial interviews, a senior designer to do final interviews, and another human resources person or assistant to complete paperwork.

Purpose
What is the general purpose of this SOP? For example, an SOP on setting up new client accounts has the purpose of ensuring all relevant information is collected and you don't have to go back to the client later to request additional details you forgot about.

Description
Describe the process that you will be detailing in the SOP. For example, the SOP for a client intake process can be described as the steps sales people need to complete when signing up a new customer for specific services. The SOP itself could be divided up by type of service the client is purchasing and what steps or information needs to be collected for each.

Process Overview (steps and/or flowchart)

Give an overview of the SOP and the high-level view of what's going to be covered. This could also be shown as a flowchart or other graphic that users can go back to as a reminder. For example, an overview of the process for hiring new writers could show the steps of Drafting the Job Spec, Placing Ads, Selecting Candidates, Interviewing Candidates, Making the Job Offer, Signing a Contract, etc.

Key Guidelines to Follow

If you have some general guidelines that the person performing the SOP should keep in mind, this is a good place to record them. For example, an SOP for handling customer service complaints could contain guidelines for when the person handling the complaint should bring it to someone higher up in your company.

Potential Problem Areas

Are there any particular areas or warning signs the person performing the SOP should keep an eye out for? For example, if you've had an issue with a certain software tool in the past, you could note that here along with what should be done about it. You could also put this section at the end of the SOP and/or include it in the detailed process itself where the problem typically occurs.

Detailed Process

Use this section to outline all the detailed steps of the first SOP being covered. How you write this section will totally depend on the nature of the SOP being covered. Using point form here is fine.

Step 1: High Level Step

1. Do this first
2. Do this second
3. Do this third
   a. More steps for number 3
   b. Even more details for 3

Step 2: Next Step

1. Do this first
2. Do this second
3. Do this third
   a. More steps for number 3
   b. Even more details for 3

Step 3: Next Step

1. Do this first
2. Do this second
3. Do this third
   a. More steps for number 3
   b. Even more details for 3

Attachments:

Checklist Style SOP [Your Title]

Overview

Insert the title of your Standard Operating Procedures document. Use this template as a guide for creating your own. Depending on the SOP you are creating, you may want to add more categories and details. However, for basic SOPs you can probably eliminate some of the sections, or cut them down.

Prepared by

Original writer of the SOP:
Date Reviewed: *[When was the SOP reviewed?]*
Reviewer: *[Who reviewed it?]*
Updates Made? *[Did he or she make any updates or changes. Reviewers should use track changes or initial them.]*
Approved by: *[Who made final approval of any changes?]*

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Checklist

Create a checklist that people can use to make sure they've covered all the steps in the SOP. The purpose of the checklist is to make it easy for people to follow the SOP without having to read through the longer document each time. Divide up your checklist into sections if there are clear sections to the process, or if there are people who are responsible for specific sections of each.

Attachments: It is important to list any attachments that are applicable to this SOP.

Table Checklist

Complete?	Task

Simple Checklist

Opening instructions or resources

Completed? **Task**

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

☐ ____

Authorized by ____________

Closing instructions, notes, resources, etc.

More on Writing SOPs

An Ongoing Process

SOPs need to be reviewed periodically. They should be reviewed at least once a year, but more often is better. After you implement your SOPs, weaknesses will emerge that you can improve. You should also seek feedback from employees for making improvements. A system for reviewing and updating SOPs needs to be put in place.

Outsourcing SOP Creation

It's often difficult to write out detailed instructions for a task that you know extremely well. It may be a good idea to outsource some of your SOP creation. Ask someone to observe your work processes and write the steps for you. You can then review and make any necessary changes.

How to Avoid Creating Restrictive Standard Operating Procedures

Standard operating procedures are necessary because they put all of your company's employees on the same page. The downside is that SOPs can be too restrictive and prevent your employees from being flexible when decisions need to be made. Your employees shouldn't just be cogs in a machine. They still need to use their own judgment, and companies generally benefit from their employees' creativity and innovation. The key is to write SOPs that are detailed and thorough, but also allow for flexibility.

Job Considerations

There are some jobs that require more creativity than others. While a strictly outlined procedure may work well on a factory line, designers and other creative types that work for your company will need to rely more on their own judgment. For these job positions, general guidelines may work better. For example, you can tell writers to write compelling ad copy and give them some of the information they need without telling them exactly how to do it or what to say.

Some tasks require more standardization than others. For example, the way your employees should handle customer complaints is something you probably want to regulate very strictly to make sure errors aren't made and all customers are treated fairly.

Examples for Clarification

You can teach your employees to better understand your company's vision and help them learn to use their own judgment by providing examples with your SOPs. For creative job positions, give examples of what you consider to be good work. In dealing with customer service, safety issues, or other regular processes, provide stories for your employees. The stories should demonstrate best practices, and what to do when similar situations arise.

Include a Review Process

When needed, a manager observes the employees in their work and offers tips and pointers for peak performance. These pointers should be documented within the SOP. Likewise, staff members can provide their feedback to help improve the SOP along the way, and can be added during the next revision.

Rely on Feedback

The best way to judge whether your SOPs are restrictive or not is to seek feedback from employees and managers. Encourage employees to tell you if they feel stifled or unsure of what to do. Include in your SOPs a standardized review process for receiving this feedback and making changes.

Reviewing and Revising Your Company's Standard Operating Procedures

After your standard operating procedures are written, they need to be reviewed carefully before they're published. Even after they're published, reviewing and revising SOPs is an ongoing process. There should be a standardized review process in place for both the initial review and regular reviews.

The Initial Review

Before SOPs are implemented, they need to be reviewed and tested. Most large companies have quality assurance (QA) managers, part of whose job it is to review SOPs before they're published. If your company doesn't have QA managers, your SOPs can be reviewed by regular managers, other employees, or colleagues. Obviously, if you’re a very small business you’re probably going to be doing the review yourself.

The reviewer will be looking for several things. First of all, SOPs should be accurate, easy to understand, and factual rather than opinion based. They need to outline their processes completely and shouldn't be repetitive. Overall, an SOP needs to meet its planned objective: to describe how X task should be performed.

The reviewer reads the SOP and takes notes on anything he or she feels needs to be revised. The SOP is then sent back to the author, who makes the revisions. Each company has a different procedure for the review process and many companies have multiple reviews. The author may submit the SOPs to several reviewers before it's considered complete. Some companies have an SOP committee that does the final review before the SOP is published. In a small company, this is done by the owner or a general manager.

Regular Standard Operating Procedure Reviews

SOPs are never finished. Rather, they are works in progress, because conditions are always changing. A company may change its policies or procedures, or new laws, regulations, or market changes may require updates to the SOPs. Your company needs to have an SOP audit and review process in place in which existing SOPs are reviewed. This system is beneficial not only in keeping SOPs up to date, but it also looks good to have a solid review process if your company is audited. Reviews should be done at least bi-annually, but it's good to do them more often.

Your system for reviews should include which SOPs need to be reviewed when and who will review them. Again, many companies have dedicated QA managers or SOP committee members. If this isn't the case for your company, designate a manager or regular employee to do the reviews.

For each SOP, determine whether it is satisfactory, needs revision, or is obsolete. A satisfactory SOP is one that is still accurate and thus needs no revision. Obsolete SOPs should be withdrawn but kept on file somewhere in case they need to be referred to.

Revise the SOPs that need it and then review using the same criteria as above. When one SOP is changed, it may impact other SOPs. This can create inconsistency, which can cause problems for your employees or customers. Determine which SOPs are impacted by the revision and revise accordingly.

After the revision process is complete, the SOP needs to be finalized by updating the administrative section of the SOP with the person who is doing the finalizing, the date, the next date for revision, and any other necessary details. All SOPs need to be finalized, including those that are revised, those that aren't, and those that are withdrawn.

Keep the End Goal in Mind

Whenever reviewing or revising, make sure everyone understands the goal of the SOP. Remember what it is supposed to accomplish. When one SOP undergoes several revisions, it can become misaligned and lead to errors or inconsistencies. An SOP may become irrelevant. Before reviewing an SOP, read its objective to clarify and make sure it achieves its stated purpose.

The purpose of SOPs is to empower more implementation. Always keep your eyes on the outcomes and the desired results.

> "There is nothing quite so useless, as doing with great efficiency, something that should not be done at all."
>
> Peter Drucker

For every minute spent in organizing, an hour is gained.

Social Media Checklists

This section includes helpful social media tasks, and also serve as great examples of checklist style SOPs.

Social media and online marketing are vast areas of study and require extensive implementation. However At the time of this writing, these are some recommended steps to help get you started. Depending on your knowledge of social media, use these as a starting point for creating your own SOPs, for you and your employees or sub-contractors.

Don't be discouraged. The most important thing is to not give up. Social media, online marketing, and inbound marketing in general, take time to get started. It's just the kind of thing where momentum builds over time – there is just no way around that. Hang in there, because you will suddenly get the hang of it, before you know it. But you must be willing to invest a greater amount of time in the beginning, during your learning and transition time, for it to ever start working.

"Better is possible. It does not take genius.
It takes diligence. It takes moral clarity. It takes ingenuity.
And above all, it takes a willingness to try."
Atul Gawande

Social Media Quick Tips:

- Make time for engaging with others online.
- Ask for shares, comments and likes.
- Answer questions and respond to comments.
- Make it reciprocal by liking, sharing, retweeting, and pinning other people's posts.
- Engagement marketing is all about reciprocity.

Facebook Quick Tips:

- Post to your personal profile and your business page every day.
- Tag other people and pages in your posts.
- Use hashtags (#).

Twitter Quick Tips:

- Send new tweets and retweet daily.
- Use hashtags (#) in tweets.
- Follow new people every week.

Linkedin Quick Tips:

- Make new connections every week.
- Ask for recommendations.
- Update the company profile and status.
- Follow related companies.
- Join Groups and create at least one group.

Google+ Quick Tips:

- Every week, add new people to circles
- Host a Google+ Hangout session to connect people with common mindsets.
- Share content on your profile and company pages every day.

Youtube Quick Tips:

- Create a channel with a common theme with a focus on what your audience is looking for.
- If you are using it for business, only post professional content. Do not post personal videos.
- Find videos each week to share on social networks.
- Create brief instructional videos for your customers and monetize them to make money each time someone's watches them.
- Video customer testimonials and upload them. Do not monetize these ones.
- Subscribe to channels relating to your industry every week.

Blogging Quick Tips:

- Write a new blog post every week.
- Share blog post links with social networks.
- Use keywords in the titles and content of posts.

Inbound Marketing Checklist

Action Steps:

Complete these steps within the next 10 days:

- [ ] Collect information for your profile and save it in a place you can access it easily from anywhere. You will use this information to set up your social media accounts.

- [ ] Sign up for these social media accounts: Facebook, Twitter, Linkedin, Google+, Youtube, Pinterest, Klout, Hootsuite, Domain Registrar, Website Hosting, Website Admin, Constant Contact, and PayPal. Record your login (username and password) and the URL to your profile for each, on the social media recording sheet further in this section:

- [ ] Assess your website/blog. Determine what changes need to be made to be ready for new visitors. Your website is your foundation and where you will put all your social media links.

- [ ] Assess your current lead capture and management system. You should have one in place, such as Constant Contact. This is an absolutely critical step, so that your social media work is not wasted. What steps will you take to get this in order?

- [ ] Create a 3 month Editorial Calendar, with at least 90 posts (one per day to start). Content ideas along with a 365 day Editorial Calendar with examples can be found here: www.marketingmotivator.com

- [ ] Manually post your first 20 entries from your editorial calendar, day after day, in each of your social networks. This will help you to get used to how the social networks work. Important: Monitor the responses and engage with people. If you are just starting out, it's good to manual post your content at first so you can get a feel for how everything works.

- [ ] Schedule your remaining Editorial Calendar in Hootsuite.

- [ ] Connect with new people every week. Make a goal of making 20 connections every week through your social media accounts.

Record your Social Media and Online Marketing account information on this sheet. Once completed, keep it in a safe, yet easily accessible place:

Facebook Profile URL:____
Username:__________________________Password:__________________________

Twitter Profile URL:____
Username:__________________________Password:__________________________

Linkedin Profile URL:____
Username:__________________________Password:__________________________

Google+ Profile URL:____
Username:__________________________Password:__________________________

Youtube Profile URL:____
Username:__________________________Password:__________________________

Pinterest Profile URL:____
Username:__________________________Password:__________________________

Klout Profile URL:____
Username:__________________________Password:__________________________

Hootsuite Profile URL:_______________________________________
Username:__________________________Password:__________________________

Domain Registrar Login URL:___________________________________
Username:__________________________Password:__________________________

Website Hosting Login URL: ___________________________________
Username:__________________________Password:__________________________

Website Admin Login URL:_____________________________________
Username:__________________________Password:__________________________

Constant Contact Login URL:___________________________________
Username:__________________________Password:__________________________

PayPal Login URL:
Username:__________________________Password:__________________________

Checklist for Setting Up Your Facebook Page

You'll need to set up a personal Facebook profile before you can create a Facebook Page. If you don't already have a personal profile, do this first. Then follow these steps.

Steps to Complete:

☐ **Log in to Your Facebook Personal Account:** Your personal account login will also be your Page login. You create your page through your profile account. You don't have to put too much personal information on your personal account, if you don't want—besides your name and the basic information they request—but it needs to be there in order to manage your Page. Log in through this account to create your Page and to manage it in the future. The profile picture for your personal Facebook profile, should be a picture of you.

☐ **Creating Your Page:** On your Facebook profile, along the tabs on the left-hand side of Facebook, click where it says 'Create a Page.' Imagine that a Facebook Page is like a satellite off of your Faceook Profile.

☐ **Choose Your Category:** Choose a category. From there, the system will walk you clearly through each step.

☐ **Basic Business Information:** Enter basic information about your business, including: your business's name, address, type of business, contact information, and more.

☐ **Fill in About and Description:** Write a short blurb that describes your company in just a few words. Be sure to include your website URL and any additional categories for your business.

☐ **Upload Photos:** Upload a profile photo and a cover photo when prompted. It is the small square image, near the top left of your page. Your cover photo is the large image across the top of your page. For your Business Page only, the profile photo should be your logo or something else instantly recognizable that tells people that this is your business's page. Your cover photo should show something related to your business, but not pull focus away from the content of your page.

Completing and Managing Your Facebook Page

- On your page, there is a place for you to choose managers.
  - These are the people who will have access to editing the page:

    ____

    ____

  - They need to have regular Facebook accounts, and you can add them by typing in their name.
- Underneath your cover photo are tabs, in the form of small image boxes.
  - Only three of them are visible to users unless they click the little down arrow, which users don't often do.
  - Customize your tabs by creating new ones and putting the ones that are most important at the top so visitors will actually see them.
- Once your page is complete, you'll have to gain followers.
  - Ask people on your profile to like your page.
  - Like other pages, and they will most likely like your page back.
  - At first, focus on simply completing your page and then adding content to it in the form of images and posts.
  - Create engaging content, which will give people a reason to follow your Facebook page.

Checklist for Setting Up Your Google+ Page

If you haven't already created a personal Google+ profile for yourself, you'll need to do that first (you cannot simply sign up a business page from the main Google+ signup screen). Once you have a personal profile, here's how to create a page for your business. Follow the steps below to get started with Google+ pages.

☐ **Pick a Category:** The first step in getting started creating your Google+ page is to choose from the five main categories.

☐ **Claim Your Listing:** Enter your business name and Google will check to see if there already is a listing in their network, e.g. in Google Places. If so, you can claim your listing.

☐ **Fill in Basic Business Information:** Enter your basic information, including your business address, email and contact information. Be sure to fill in your website URL and set your privacy settings to public so that you can be found.

☐ **Add Your Tagline:** You will be asked to add your tagline (the 10 words that best describe your page).

☐ **Add Your Profile Photo and Tagline:** You will also be asked to add your Page's profile photo. Similar to Facebook, you should use your personal photo in your personal G+ profile, and use your logo or photo for your G+ Business Page. But, never use your logo in your personal profile.

☐ **Edit Your Page Information:** Once you've perused your page's welcome screen, you will want to edit your page's information. Go to your page's profile by clicking on the Profile icon at the top, left of the Search Google+ box. Then go to your About tab and Edit Profile. You can add an Introduction, add people from your Circles, link to your website, and more

☐ **Add Content:** Start adding content to your page, such as photos and videos. Set up a regular schedule to post updates and share other information about your business.

Google+ Best Practices

- As with all social networks, try to avoid creating a separate Gmail account for your Page, is your need to have multiple admins. You will need to share that accounts password with anyone who needs to administer the page.
- Connect your Google+ Business Page with your Google Places.
- Link your website to your Google+ Page so that your Page is discoverable on all Google's search and SEO related services.
- Use the tutorials that Google offers to learn more about what you can do with your Google+ Page.
- Your Gmail / Google account is also used to manage our Youtube Channel.

Checklist for Setting Up Your Linkedin Company Page

☐ **Start Creating Your Page:** Click on "Interests," then "Companies" in the top menu bar of your personal LinkedIn profile. Then click on the 'Add a Company' link in the upper right-hand corner. It will ask for your company name and email.

☐ **Establish Your Company Page Eligibility:** Company Pages aren't available to all businesses. Only certain companies are eligible. Among other things, you need an email address with your website domain in it (not a free Yahoo or Hotmail account.)

☐ **Add Company Info:** If you're eligible to create a Company Page, LinkedIn will send you a confirmation email that you can use to get started. When you click the link in the email, it will redirect you to a page where you can edit your company information. This includes choosing admins, uploading a logo, and writing a company description. Be sure to use keyword-rich descriptions and tags.

☐ **Add Product and Services Info:** Click on the Products & Services tab to add more specific information about your products or services, images, features, promotions, videos and additional product-specific information.

☐ **Adding Content:** It's important to post status updates to your Company page on a regular basis. Include images and projects you've worked on

LinkedIn Company Pages Tips and Best Practices

- Upload both a regular logo and a small square logo to use as an avatar. Pay attention to sizing restrictions, and make sure it looks the way it should.
- Ask your employees to add your Company Page to their profiles. This will get your page more exposure.
- Add a banner image to your Page. This is like the cover photo of a Facebook Fan Page. It helps to show what your business is all about.
- Elicit product recommendations to use as content on a sidebar. This is a powerful form of social proof that will encourage others to try your products.

Checklist for Starting a Linkedin Group

The best way to connect with others on LinkedIn is to go out and be proactive. Don't sit and wait for them to come to you. Join groups, create at least one group, connect with others, comment on content, and provide help for other users.

☐ **Choose Your Topic:** Look around at other Groups related to your industry. Identify ones that have the most interaction before selecting your own topic. Pick a topic that is narrow enough to attract people that are truly interested in that subject, but not so broad as to compete with much larger groups. Try to offer something new and different.

☐ **Create Your Group:** On the left side of your profile page, you'll find a link that says 'Groups.' There are several options and one is 'Create a Group.' By clicking this, you will be directed to a page where you can add information about your Group.

☐ **Add Your Information:** Upload your company logo or a logo that you've specifically created for this Group. Provide your Group name, type, summary and a description.

☐ **Set Access:** Set the language, location (if applicable) and access level for your Group. You can make it either "open access" or "request to join".

☐ **Add Rules and Regulations to your Group:** It's important to establish clear rules about what can and cannot be posted.

LinkedIn Company Group Tips and Best Practices

- Once your information is complete, the site will ask you for members' names and emails. These can be entered manually or uploaded as a spreadsheet. People on this list will get an email from LinkedIn inviting them to join your Group and when they apply, they'll be automatically accepted.
- Manage your LinkedIn Group as if you were running a forum. Supply content, facilitate conversations, respond to posts and questions, and moderate.

Checklist for Setting Up Your Twitter Account

- ☐ **Define Your Purpose:** The first step to creating a Twitter profile is to set out a clearly defined purpose. Twitter won't get you anywhere if you don't know what you want to achieve with it.

- ☐ **Select a Username:** First, give Twitter your name, email address, and password. It will then ask for your username. It's always best to choose your company's exact name, however you only have 15 characters so you may have to use an abbreviation.

- ☐ **Fill Out Profile Information:** Your introduction can only be 160 characters long, depending on whatever Twitter's latest rules are. Since this is so few, make it short and sweet.

- ☐ **Add Images:** Upload your picture. This should be a picture of you, your logo, or something else recognizable that tells people on Twitter that it's you. Make it the same image that you use in your other marketing materials.

- ☐ **Add a Header and Background:** While it's not required, you can add a custom header and background to your profile. Use something that communicates your branding.

- ☐ **Add Links:** Add a link to your website or another profile. You get one active link in your Twitter profile and most businesses use their official website URL. If you need two, add it in your description.

Twitter Best Practices for Businesses

- Tweet before you go on a following spree. Make sure to populate your account with about ten tweets before you start following other users.
    - If you have no content, you may look like a spammer.
    - Your content gives people a reason to follow you back.
- It's best to grow your list of followers slowly rather than all at once.
    - You may be tempted to grow your list immediately, but instead, try to gain about three new followers at a time.
    - Follow them, interact with them, and get to know them before gaining new followers. This way, you'll know your followers better and have a stronger connection with them.
- Get into a regular routine of tweeting.
    - Most corporate accounts tweet around twice a day.
- A good way to find things to tweet about is to look at current events or what's trending in your industry.
- Since everything on Twitter is in real-time, experiment with different times for your tweets to see when you get the best response.

Checklist for Setting up Your YouTube Channel

Just like with Google+ Pages, you'll need a Google account to set up a YouTube channel. If you already have a Gmail or Google+ account, you're ready to go. Otherwise, follow Google's directions for setting up an account when you go to start your YouTube Channel.

- ☐ **Select a username:** Click on the option to "use a business or other name" and use your business's exact name if possible. This will also ensure that your channel shows up in search results when people look for your company online. Use only letters and numbers in your username with no punctuation or spaces.

- ☐ **Upload a photo:** For your profile picture, use your logo or another image that identifies your or your business. The photo must be 250 x 250 pixels, so keep it simple.

- ☐ **Customize Your Channel:** Explore YouTube design options to customize your channel with different colors and themes, and now a cover image.

- ☐ **Add Profile Information:** In the About tab, write a Channel Description to introduce your company and the purpose of your channel to new visitors.

- ☐ **Upload Videos:** Click on "Upload My First Video" to upload a video. While it's uploading, add a title, description, and tags for the video. Make sure you add many keyword tags to make the video easily searchable in both YouTube and Google.
- ☐ **Monetize!** You can now monetize your videos. That means you can make money each time someone watches it. Add monetization to videos that will attract users for practical purposes. For example, instructional and informational type videos. Do not monetize videos such as testimonials and videos that were made to promote your business. Otherwise, you could lose watchers to other places. Use monetization very strategically.

YouTube Best Practices

- All of the videos on your YouTube channel should be relevant to your business and your customers. There should be nothing out of left field and nothing personal. If there's a video that's not relevant on your channel, it may confuse users and interfere with your branding.
- You can organize your videos and group them together by topic into Playlists. This makes it easier for users to find the videos they're looking for. You can do this at any time after your videos are uploaded.
- Engage with other users as much as possible. Comment on their videos and subscribe to their channels. This will get your channel seen more widely and you'll make connections.
- Make it easy for users to subscribe to your channel. Put the link to your YouTube page on all of your social media channels and websites.

Checklist for Setting Up Your Pinterest Account

If you've created a regular account for your business on Pinterest, you should change it to a business account. One incentive to do this is to take advantage of the Business Accounts' special features. The other is that it's against the site's rules. The Terms of Service states that if you're using the site for any type of commercial gain, your account must be a business account.

- ☐ **Convert Your Account or Start a New Account:** You can either create a new business account or transfer your regular account profile to a business account. To do either, go to the 'Pinterest for Business' page, at http://www.business.pinterest.com. You'll see a large red button for 'Join as Business'. Click on that and you'll come to the Create Business Account page, where you'll see a button on the top right that says "Already have an account? Convert".

- ☐ **Basic Profile Information:** Choose your type of business. The categories include Public Figure, Professional, Media, Brand, Retailer, Online Marketplace, Local Business, and Institution/Non-Profit. If you're not sure which suits your business, don't worry. You can go back and change it at any time. Also add the contact details for the person managing the account.

- ☐ **Upload Profile Image:** Upload a profile image that represents you or your company, such as your business logo. Keep it consistent with your other social media profiles.

- ☐ **Fill In Your About Information:** There is an About field on your profile where you can write a description of your business. It only allows you 500 characters (that's characters – not words!) so it must be short and concise. Use this precious space to describe your business, and infuse your description with a little creativity, not just the standard 'Company X is a manufacturer of widgets, etc.'

- ☐ **Set Privacy Settings and Finalize:** Make sure your account is easily found by turning OFF the slider that says "Prevent search engines from including your profile". Then agree to the Terms of Service so that your profile is live.

Happy Pinning

- Once your Pinterest Business Account is live, add the Pin It feature to your browser toolbar so you can pin with one easy click.
- Add the Pin It button to your website so that visitors can pin content easily from your site.
  - To find your "Goodies" and Pin buttons, go to the "About tab" at the top of the page and it will teach you how to add the Pin It button.
- Focus on pinning content that is fun, relevant, and interesting to your customers.

When Employees Don't Like Your Standard Operating Procedures

When you implement or change standard operating procedures, this inevitably changes things for your employees. These changes can sometimes be drastic and affect their daily work. It's only natural that there may be some resistance from your employees to these changes.

There are several reasons your employees may not like SOPs. New rules and regulations tend to rub people the wrong way. Employees may feel that you're taking decision-making power away from them, or that you don't trust them enough to make their own decisions. It may appear to them as a criticism of their work. Some employees feel that they thrive in a casual environment and that standardization stifles them.

For example, if a small company that has never had sales and marketing SOPs before creates SOPs that outline the sales process, this may threaten your sales staff. Even if the SOPs simply document the process without making any changes, the employees may feel like they've been handling things just fine. Why do they need standard procedures? There are things your company can do to mitigate this resistance so that you can get back to business as usual.

Get Employees Involved

Ask your employees to help you create your company's SOPs. Have them document regular procedures they use and offer ideas for improvement. Get employees involved in the review and editing process as well. Their direct experience will help to create better SOPs, and they'll feel that they are more involved.

The same goes for the review and revision process. Give your regular employees an active role in reviewing and revising SOPs so that they feel empowered and can make the necessary changes. Often they'll find ways to improve the efficiency of a task as they go through the process of reviewing an SOP.

Not Top Down

Communicate well with your employees and make sure they understand that this is not a top-down situation. SOPs are meant to empower them and make their jobs easier, as well as raise the quality of the products and services you offer. Let them know that their input is always welcome and seek their feedback.

Offer Leeway

Make sure your SOPs are not too restrictive. Your employees need some flexibility in order to make their own decisions. In many work situations, you can give them general guidelines to follow along with examples. Reiterate your company's vision and values to help your employees in decision-making, rather than forcing them to adhere to restrictive rules.

When Employees Complain

Keep in mind that when an employee complains about a particular SOP, they may not be simply defensive or resentful. There is a good chance that there is a legitimate problem with the SOP that you, in creating it, did not find. Your employees are the ones on the ground using the procedures you've created, and they can often spot weaknesses quickest. Take each complaint seriously and use it to create better, more efficient SOPs.

Try a Change Management Program

Utilizing the skills of an experienced Change Management trainer or coach can make all the difference. Or, purchase a leadership or change book for each staff member, and meet once a week to discuss each chapter, during the start-up process. "Who Moved My Cheese? An Amazing Way to Deal with Change in Your Work and in Your Life", is a classic book written by Spencer Johnson used for this purpose. It's a motivational book written in the style of a parable or business fable. It's a quick read, but offers great impact as people explore their reasons for resisting change, and reveals to them what might be holding them back.

"Good is the enemy of great."

Jim Collins

Standard Operating Procedures for Freelancers

All businesses, whether great or small, need standard operating procedures (SOPs) to codify their business processes. If you're a freelancer, you are a small business of one. Although you don't have employees that need to be kept on the same page (although in the future you may), it's still good to have SOPs in place to increase your efficiency and make your freelancing business more established and legitimate.

The Benefits of SOPs for Freelancers

There are a number of reasons your freelance business can benefit from SOPs.

- Standard procedures help you get the work done in an organized and efficient way.
- SOPs ensure a standard level of quality for your services.
- With SOPs, the sales process is smoother and all of your clients and customers will be treated equally.
- When you find yourself ready to hire employees or outsource, your procedures will already be outlined for them.

All of the above benefits lead to a more sustainable and profitable business.

Creating SOPs isn't something you have to do before you get your freelancing business off the ground. In fact, even if you have outlined a few basic processes beforehand, they are bound to change after your business has been operating for a while. Your freelancing experience is going to inform your standard procedures, and you'll need to draw on that experience to write good SOPs.

Also, clearly defined procedures can stifle the creativity and flexibility that you need to get started as a freelancer. Wait until things settle into routines, and then you'll understand what needs to be outlined and exactly how.

Areas to Standardize

The best possible scenario is to create SOPs for everything you do. But for freelancers, time is especially precious, so this is not always possible. Here are some areas in which you may want to create SOPs.

- **The Sales Process:** Your SOPs can cover standard rates and pricing structures and guidelines on how to communicate with customers. You might want to create procedures for accepting or turning down jobs.
- **Marketing:** Any regular marketing you do can be outlined in SOPs. This could range from things like email marketing broadcasts, blog posting, and website updates to social media activity, posting of ads, and so on.
- **Workflow:** Many freelancers manage multiple jobs, so creating procedures to manage workflow is very important. You may want to create SOPs for handling deadlines, establishing priority, or what times you work on certain regular jobs.
- **Accounts and Billing:** If you're going to standardize only one area, this is the one to do. It's much easier to run your freelancing business when all of your financial processes are clearly outlined. This includes taking payments, financial transactions, business expenses, managing recurring payments, paying taxes, audits, and so on.

Writing Freelancer SOPs

Even if you are a sole proprietor, with no staff quite yet, you should still create simple documents that describe your company's essential processes. As an entrepreneur and business owner, you wear so many hats and are responsible for every aspect of your business operations. Keeping track of things can be challenging, but SOPs can help with staying organized and moving forward with more momentum. With technology moving so fast, it's important to make notes along the way, so you don't have to re-learn things that may be difficult to recall and grasp easily. It may feel at first like it's an inconvenience to document things, but it will save so much time down the road.

When you are ready to hire someone, you will be ready to train your staff quickly and efficiently. Also, keep in mind, that documents that make sense to you, may not make sense to others. So, when it comes time to outsource or hire others, touch up these documents, adding detail and making sure they're clear and accurate.

Content Options

SOPs don't have to be exclusively text-based. In fact, they benefit from visuals and other added content. You can create your SOPs in whichever format you like or in multiple formats, such as audio or video. When outsourcing, you can give your assistants these videos to use as tutorials along with the text for reference.

Reviewing Your SOPs

Businesses review and revise their SOPs on a regular basis, usually quarterly or bi-annually. As a freelancer, you may not want to spend a great deal of time on this. When you become aware that a procedure has changed, update the SOP. Before outsourcing, review everything. As long as things are going well, your SOPs don't need a great deal of attention. However, if your freelance business isn't running as smoothly or efficiently as you'd like, it is probably time for review.

Implementation

Building on the work of experts such as Gawande, Gerber, and Pareto, we must also remember that success does not come about by researching and writing down our processes. It doesn't end there; it begins there.

While documenting procedures is always a work in progress and a critical part of business growth, the most important part is implementation—the act of carrying out the system. It is only there to assist us in accomplishing the following:

- Focusing on revenue generating activities.
- moving us towards working on our business, not just in it
- Allowing you to fulfill your most gifted role.
- Implementing what works - rinse and repeat.

If you stop with documenting, for the sake of documenting, then it becomes bureaucracy. Your SOPs should be the beginning of the journey towards freeing yourself up to do what you love!

"The purpose of bureaucracy is to compensate for incompetence and lack of discipline."

Jim Collins
Good to Great: Why Some Companies Make the Leap...And Others Don't

Conclusion

Depending on the size and nature of your business, you certainly won't be creating documents for every area listed in this workbook. Focus on the ones that make most sense to the smooth running of your own business and work on those first.

Use the **Standard Operating Procedures** and **Checklist Templates** as a guideline for creating your own SOP documents. Eliminate or add to them as necessary.

However, just because we've provided a template doesn't mean all SOPs require a document like that. Evaluate your own processes before you decide on a format for your SOP. Use what works for your particular organization. A simple flowchart could be all that's needed.

Finally, to be a leader in your field, a facilitator of best practices, a voice for cutting edge innovation, and a practitioner of excellence, you must embrace the principles and practices of Standard Operating Procedures. Creating standard operating procedures may sound like a tedious task on the surface, but it's essential to the efficient operations of any successful business. Don't put it off for long, especially if you find the same mistakes being made over and over in certain areas.

This quote from Gawande can be applied to every one of our industries and organizations, because they are also made up of a variety of people, problems and passions:

"We look for medicine to be an orderly field of knowledge and procedure. But it is not. It is an imperfect science, an enterprise of constantly changing knowledge, uncertain information, fallible individuals, and at the same time lives on the line. There is science in what we do, yes, but also habit, intuition, and sometimes plain old guessing. The gap between what we know and what we aim for persists. And this gap complicates everything we do."

Atul Gawande

Appendix A: Examples of SOPs, Handbooks, and Other Related Documents

Marketing Motivator
www.marketingmotivator.com

Atul Gawande's Checklist for Checklists and other helpful resources:
http://gawande.com/the-checklist-manifesto

Database of more than 200 social media policies:
http://socialmediagovernance.com/

Emergency Social Media and Web 2.0 SOPs: Guidance Material
http://idisaster.wordpress.com/2010/09/16/social-media-and-web-2-0-standard-operating-procedures-guidance-material/

About.com Blogging and Social Media Policy Sample
http://humanresources.about.com/od/policysamplesb/a/blogging_policy.htm

Communication Policy for the Government of Canada:
http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316&section=text

A Guide to the Employment Standards Act from British Columbia here:
http://www.labour.gov.bc.ca/esb/esaguide/

USA Government Social Media Handbook:
http://www.gsa.gov/graphics/staffoffices/socialmediahandbook.pdf

US Small Business Administration SOPs
http://www.sba.gov/about-sba/sba_performance/policy_regulations/standard_operating_procedures

International Standards & Best Practices
http://www.iso.org/iso/standards_development.htm

Appendix B: Training Certificate

Offer a training certificate when someone completes their learning in a department or section of SOPs. This further establishes and reinforces the importance and value of SOPs. Below is an example of how you can generate a simple one in house. Print it on nice paper or certificate stock for added impact:

TRAINING CERTIFICATE

STANDARD OPERATING PROCEDURES (SOPs)

__________________________ HAS SUCCESSFULLY COMPLETED

"TRAIN THE TRAINER" TRAINING AND IS CERTIFIED TO TRAIN

[Company] EMPLOYEES ON THE BELOW LISTED "SOP" MODULES

☐ SOP #1	☐ SOP #4
☐ SOP #2	☐ SOP #5
☐ SOP #3	☐ SOP #6

Date: __________________________

__________________________ __________________________

TRAINER SIGNATURE DIRECTOR SIGNATURE

Appendix C: Quick List of Common Areas for Creating Sops

Here is a condensed list of SOPs that any business should have and can use. This list is not exhaustive, and your specific business will have many others that you will find helpful. This is a good start, though, and gives a nice overview of what an SOP system may look like. Check off the ones you have in place already.

Production and Operations

- ☐ Steps in Producing Products or Implementing Services
- ☐ Quality Review Process
- ☐ Maintenance and Inspection of Equipment and Tools
- ☐ Managing Files and Data

Human Resources

- ☐ Hiring Employees
- ☐ Recruiting Procedures
- ☐ Writing, Placing, and Managing Job Ads
- ☐ Contacting Applicants
- ☐ Determining Which Candidates are Called for an Interview
- ☐ Setting Up Interviews
- ☐ System for Note-Taking So That Other Employees Know Whether A Person Has Been Contacted or Not

Interviewing and Screening Procedures

- ☐ When and Where Interviews are Conducted
- ☐ What Questions are Asked
- ☐ Management of Interview Notes

Policies for Considering Applicants

- ☐ Background Checks
- ☐ Screening
- ☐ Checking References
- ☐ Checking Certifications

Orientation and Training New Employees

- ☐ Teaching The New Hire About Your Company's Culture and Policies
- ☐ Employee Manuals
- ☐ Training Sessions

Performance Evaluation

- ☐ When Evaluations Occur
- ☐ Who Conducts Evaluations
- ☐ How Employee Performance Is Evaluated
- ☐ How The Results are Communicated to Employees
- ☐ System for Promotions and Pay Raises

Other

- ☐ Employee Conflicts
- ☐ Corrective Actions
- ☐ Compensation
- ☐ insurance
- ☐ Benefits
- ☐ Payroll Policies
- ☐ Firing Employees

Marketing and Sales

- ☐ Social Media
- ☐ Press Releases
- ☐ Public Relations
- ☐ Advertisements
- ☐ Communication With The Press
- ☐ Online Marketing
- ☐ Talking With Customers or Clients About Your Products or Services
- ☐ Preparing Sales Quotes and Proposals
- ☐ Negotiating
- ☐ Following Up
- ☐ Market Research
- ☐ Marketing Methods
- ☐ Tracking Sales
- ☐ Specific Marketing Activities (I.E. Direct Mail, Email Marketing, Social Media, Etc.)

Communications

- ☐ Answering and Directing Calls
- ☐ Sending Interoffice Memos
- ☐ Sending and Managing Emails
- ☐ Handling Client and Customer Data
- ☐ Chain of Communication for Different Events

Customer Service

- ☐ Response Time to Inquiries
- ☐ Delivery Time and Method of Services or Products
- ☐ Warrantees
- ☐ Returns and Refunds
- ☐ Dealing With Customer Complaints
- ☐ Reputation Management

Financial Operations

- ☐ Bookkeeping Procedures
- ☐ Expenses
- ☐ Credits
- ☐ Transactions
- ☐ Assets
- ☐ Liabilities
- ☐ Procedures for Creating, Reviewing, and Documenting Budgets
- ☐ Payment Policies
- ☐ How You Take Payments From Customers or Clients
- ☐ Management of Account Documents
- ☐ System for Managing, Organizing, and Storing Account Documents
- ☐ How You Secure The Documents
- ☐ How You Protect Your Customers' Privacy
- ☐ Company Expenses
- ☐ Employee Expenses and How They are Reimbursed (I.E. Travel, Supplies, Other Work-Related Expenses)
- ☐ Which Expenses are Eligible for Reimbursement
- ☐ How Your Employees Get This Reimbursement
- ☐ How Reimbursement Records are Kept
- ☐ Tax Assessments
- ☐ System for Recording Expenses for Tax Purposes
- ☐ Procedures for Storage and Management of Tax Documents

- ☐ Steps for Filing and Preparing for A Tax Audit
- ☐ Financial Reporting and Analysis
- ☐ How Regular Reporting Is Done and Measures Taken to Ensure That It Is As Accurate As Possible
- ☐ Review Process
- ☐ Performance Appraisal Procedures

Legal Operations

- ☐ Compliance Review
- ☐ Industry Regulations
- ☐ Correspondence Requirements
- ☐ Response to Legal Letters

Privacy

- ☐ What Information You Collect
- ☐ What You Share and With Whom
- ☐ How Information Is Kept Private
- ☐ Measures You Take to Ensure Privacy

Accessibility

- ☐ Accessibility to The Disabled
- ☐ Disaster Preparedness

Computers and It

- ☐ Hardware and Software Management
- ☐ How Programs are Maintained and Kept Running Smoothly (I.E. Evaluating Programs, Upgrading Software)
- ☐ Rules About Access to Certain Software
- ☐ Password Management
- ☐ System Security
- ☐ Managing Passwords and Access
- ☐ Periodically Changing Passwords

- ☐ Conducting in-Company Security Audits
- ☐ Upgrading Security Systems
- ☐ Making Improvements to Security Systems
- ☐ Internet Policies
- ☐ What Is Allowed and What Is Not Allowed At Work
- ☐ Restrictions On What Files Can Be Downloaded or Shared Online

Other

- ☐ Troubleshooting
- ☐ Security Training
- ☐ How Computers are Used in Your Company

Sops for Freelancers

Sales Process

- ☐ Standard Rates
- ☐ Pricing Structures
- ☐ Guidelines On How to Communicates With Customers
- ☐ Procedures for Accepting or Turning Down Jobs

Marketing

- ☐ Email Marketing Broadcasts
- ☐ Blog Posting
- ☐ Website Updates
- ☐ Social Media Activity
- ☐ Posting of Ads

Workflow

- ☐ Handling Deadlines
- ☐ Establishing Priority
- ☐ What Times You Work On Certain Regular Jobs
- ☐ Accounts and Billing
- ☐ Taking Payments
- ☐ Financial Transactions
- ☐ Business Expenses
- ☐ Managing Recurring Payments
- ☐ Paying Taxes
- ☐ Audits

Appendix D: References & Resources

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Kock, Richard. "The 80/20 Principle: The Secret to Achieving More with Less". Crown Business (1999). ISBN-13: 978-0385491747

Marshall, Perry. "80/20 Sales and Marketing: The Definitive Guide to Working Less and Making More". Entrepreneur Press (August 13, 2013). ISBN-13: 978-1599185057
If you're a sales and marketing professional, you can save 80 percent of your time and money by zeroing in on the right 20 percent of your market. With powerful 80/20 software (online, included with the book), you'll discover how to slash time-wasters, locate invisible profit centers in your business; advertise to hyper-responsive buyers and avoid tire-kickers; gain coveted positions on search engines; differentiate yourself from rivals and gain esteem in your marketplace. 8020 Sales and Marketing is built for 80/20 speed learning. Specially marked "Pareto Points" help you digest the most valuable tips in 1-5 minutes. Each chapter concludes with a Pareto Summary. The book features an online 1-page "80/20 Cheat Sheet."

Pearson, John. "Mastering The Management Buckets: 20 Critical Competencies for Leading Your Business or Non-profit" (2008). ISBN-13: 978-0830745944
Description: This book is an essential checklist for leaders, ensuring that all the bases are covered. the foundational idea behind Mastering the Management Buckets is to think of leadership and management as a three-legged stool: Cause, Community and Corporation. The 20 buckets (core competencies) fit under one of those arenas--and wise leaders know that you need a balanced approach of all three legs.

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