

The SOP **Strategy**

The SOP Strategy

Creating the Standard Operating Procedures that your business needs to succeed doesn't exactly sound sexy.

But, **the trade-off comes when one of your team members is out sick, and you have a step-by-step guide to make sure that what needs to get done still gets done.**

Those SOPS will also come in handy if you want to scale your business.

Or sell your business.

Or even just take a little more time away from your business to live your life.

They're the standards that set your team and your company up for success by creating clear expectations and a "How To" guide to getting the job done.. **So you can take back your time and actually enjoy your life outside of work.**

Here Are 5 Steps to Creating Successful SOPs

Step 1: Put the Prep Work In

Creating effective SOPs is a lot like painting your house; the longer you spend taping, draping, and prepping your work, the easier you make the process. And the better the final product will be.

It starts with asking key questions about your business to create a clear picture of the work that needs to be done.

⇒ **What are the roles that need to be filled in your business?**

⇒ **What are the responsibilities of each role?**

⇒ **Who is responsible for each role?**

⇒ **What are their goals?**

⇒ **What results are they accountable for creating?**

Some tasks don't fall under any given role, like if you use software essential to your business, but you don't have an IT department. **Keep in mind that these company tasks also need SOPs.**

Dana Corey

Step 2: Set Your Standards

Once you're clear on who is responsible for doing what, you need to decide on a format for all your SOPs. **Make everyone's lives easier by formatting every SOP, protocol, and system using the same method** so all your processes are aligned and easy to follow.

⇒ **Create a template that all your SOPs will follow.**

Whether that means checklists, workflows, or videos, adopt the approach that works best for your team.

⇒ **Identify overlap.**

Some tasks depend on work assigned to other members of your team. Identify those activities and roles and how you will note or codify the overlap in your SOPs.

⇒ **Index everything.**

Every SOP should have a Table of Contents or an index, even if there are only two steps to completing the task.

⇒ **Make a map.**

Get the big picture perspective. Create a flowchart that clearly shows how your processes come together to deliver excellence.

Dana Corey

Step 3: Divide and Delegate

All standard operating procedures should be written by the person who is doing that particular task in their given role. They're the ones who know the job best, so have them create the SOP while they're doing it.

⇒ **Document.** Work through the task noting every single step, press of a button or click of a mouse, from the very beginning until the task is complete .

⇒ **Keep it simple.** This is not the time for flowery language or insider acronyms.

⇒ **Highlight “how.”** Focus on how the work gets done, not just the outcome.

Once an SOP is written, the process should be so clear, anybody could follow the instructions, complete the task, and get the desired results.

Strategic Suggestion

AI assisted software, like Tango or Loom, can help craft your computer-based SOPs by documenting every keystroke so you don't have to.

Dana Corey

Step 4: Buddy Up

Partner your SOP creators with somebody who has never done the job before and is unfamiliar with the process, so they can easily identify any missing steps.

⇒ **Test the process.** Once the SOP has been written, have the original creator sit with their partner while they execute the instructions, step by step, word for word.

⇒ **Close the gaps.** When your tester gets stuck, their partner is on hand to fill in the blank and document the missing steps.

⇒ **Reset and retest.** Once any gaps have been closed, start the SOP test over to ensure the process flows perfectly from start to final desired outcome.

Here's why: When we're really good at something, or used to following a particular process, we internalize steps along the way. **It's like muscle memory; we don't think about what we need to do, we just do it.**

Dana Corey

Step 5: Action Alignment

Your SOPs need to be living documents that reflect the adjustments you make to evolve your business. As time goes on, you learn, grow, and change the order of things. You take a shortcut, or add an extra step to refine your processes and enhance your results.

⇒ **Revisit your SOPs** every six months to ensure they reflect these changes to your procedures and what is happening in your business.

⇒ **Ensure ease of access.** Make your SOPs easy to find and easy to use. Every employee should have digital access to the full SOP manual.

⇒ **Back it up.** Keep hard copies in the workplace so you don't lose all that hard work if your system goes down or other technical issues arise.

Dana Corey

Unlock C-Suite Insights

Cut through the noise and execute with excellence.

Challenge your preconceived notions, elevate your expertise, and catapult your company to new heights with impactful and irreverent insights founded on forty years of building businesses and mentoring industry leaders.

Get Connected



Dana Corey