Building Your SOP Folder

By Karl W. Palachuk

Your Name: _____

Your Company: _____

Whether you start with a physical 3-ring binder or a collection of files on a server, you need to create a place to store your Standard Operating Procedures. There are dozens of ways to go about this organization, so adjust this advice to fit your needs and your organization.

Start Out "Disorganized"

Computer file folders are analogous to physical file folders, like the 3-tab ones you probably have in your file cabinet. I recommend that you start out your SOP Folder project by creating two folders – one physical and one electronic. The physical folder goes in your filing cabinet in a folder labeled **SOPs**. The electronic version should be in a place that everyone can access such as

\\server\YYYY\Operations\Processes_and_Procedures\Drafts

These folders are literally "catch-all" folders to store SOP ideas until you can organize them. Some you can capture from books or web site. Some you will create in response to need in your business.

I highly encourage you to begin documenting everything and creating a culture of documentation. In this way, everyone who works with you can help you create documentation. For now, you're going to put four kinds of things in your folders:

1. Ideas and thoughts about processes and procedures you want to create
2. Processes and procedures you have already created
3. Drafts of partially written processes and procedures you've created or found
4. Sample processes and procedures you have copied from various documents and web sites

At first, these will be very disorganized, but that doesn't matter. Each is an idea or a "starter" that will get you going when it's time to write an SOP. Collect as many of these tidbits as you can.

TIP: For a naming convention, take advantage of long file names and start with the keyword you will look for when you need the SOP. For example, "Payroll New Employee Setup" is 100 times better than "Setting Up a New Employee for Payroll." You're going to look for *Payroll*, not *Setting Up*.

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Individual Files to Larger Documents

You will probably begin by creating individual files for each SOP. This will make them easy to find and organize. If you decide to combine them all into one or more larger documents, you can start by creating sub folders and moving the SOPs into appropriate folders.

For example, you might have folders for Administration, Sales & Marketing, Finance, and Technical. Simply move SOPs into the appropriate folders. Then get in the habit of creating new SOPs inside the correct folder.

Many companies use files and folders as their permanent SOP organization. That is, they never combines all their SOPs into one big document. This makes it very easy for your to edit one little document rather than a much larger document. **I recommend you use the files and folders method** until you have a reason to combine your SOPs into a larger document.

At some point, you may find it handy to combine sever SOPs into one document. For example, you might combine most or all of the Tech Support documents into one file so you can hand it to new technicians when you hire them. It can act something like a training manual for them. Or you might combine all the finance-related SOPs into one document for the bookkeeper.

If you combine a number of SOPs into one large document, you'll need to create a table of contents. If you don't know how to do this, you need to learn. In Microsoft Word it is very simple (once you know how). Simply go to the References ribbon and choose Table of Contents. Then you'll need to format each of the SOP titles as a heading of some type in the Styles section of the Home ribbon. From time to time, update the table field and it will fill in the changes you've made.

You will also need to update the document on a regular basis. If you change alarm companies, for example, you will need to update a piece of the document. If you have a document with several SOPs in it, you'll need to be vigilant that it does not become outdated.

Going Electronic

Gradually, you will transform tidbits and ideas into actual SOPs. All those papers and physical snippets should make their way into documents. Maybe the document will consist of only a title and a note. That's a start!

You can't edit a blank page. So anything you have is a step in the right direction.

It is very common to start out with three sets of documentation for your business: Technical (service delivery), Financial, and Administration. Administration will include personnel matters for now. Whether you write your own or buy one, you'll need some kind of an employee handbook if you're going to hire people.

The Finance and Administration documents should be stored in appropriate folders accessible by the owner, office manager, and anyone else who might use them or help to develop them. This might be your company's server share or a SharePoint site.

Similarly, the technical documentation should be in a series of folders stored on a share or SharePoint site accessible to the tech staff.

For ideas on organizing all these files, see

http://blog.smallbizthoughts.com/2012/10/sop-friday-organizing-your-company.html

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