SOPs "To Do"

Your Name: _____

Your Company: _____

You need a variety of Standard Operating Procedures to run your business effectively.

- From the list below, select ten items that you consider to be the **most important** items you need to work on. If you have an issue that is not on this list, include that instead.
- For each of the ten, make notes about why you need this SOPs and what you plan to achieve because of it.
- Finally, determine who can help you create this SOP or provide a rough draft for you.

Your Ten Proposed Management SOPs:

1. Topic: _____

Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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2. Topic: _____

Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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5. Topic: _____

Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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Procedure or Procedure Notes: _____

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8. Topic: _____

Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

10. Topic: _____

Procedure or Procedure Notes: _____

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Assigned to or Assisted by: _____

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SOP / Management Topics

QuickBooks Chart of Account - Straighten Out
Email Templates (Client Communications) - Set Up
Contracts in PSA - Setup
Items/Services to Sell - Define
Quoting Process - Refine
Items, Categories, Services, and Service Bundles in PSA
Invoices in PSA - Set Up
Priorities in PSA - Set Up
Queues in PSA - Set Up
Statuses in PSA - Set Up
Workflows in PSA - Set up
Weed Your Client Garden
Hardware and Software Sales Policies
Accounts Receivable as Low as Possible
Niche Markets - Determine 1-3
Quiet Time Every Day
Monthly Newsletter for Clients
Web Site - Tune Up
Company Public Folders Efficiently Set Up
Shared Company Files/Folders Efficiently Set Up
Company SharePoint or Alternative Set Up
Company Date Format Policy - Establish
Standard Service Packages to Offer
Labor Rates for Next 18 Months
Policy on Selling Equipment Sold
File Location Policies
Hourly vs. Salary Policy
Payment in Advance Policy
Late Payments Policy
Appropriate Pay Dates
Phone Policy Internally
Phone Policy re Clients
Hiring Process for Technicians
On-Boarding Process for Employees
On-Boarding Process for Clients
Layoff/Firing Policy for Employees
Celebrate Client Anniversaries
Company Motto, Slogan, Pitch
Cash Flow - Review Weekly
Finances - Review at Least Monthly
12-Month P&L Up to Date
Employee Handbook
Email Rules and Etiquette - Establish Policy
Schedules for Running Company
Telephone Policy and Rules
Interruptions - Establish Policy
Alerts in PSA
Managing Internal Admin Tasks - Establish Policy
Front Office Roles & Responsibilities
Time Sheet Submission & Approval Process
Adding a Machine to MS Contract
Invoice Review and Processing
Sales Process in PSA / CRM - Define
Business Cards - Policies and Process
Company Mission and Vision
Employee Review Process
Accounting Operations Manual
Organize Standards and Procedures - Company
Best Practices Guide
SOX Compliance
HIPPA Compliance
PCI Compliance
Sales Operations Manual
Marketing Operations Manual
Perfect Client - Define
Client Exit Process
New Client Welcome Packet
Client Roadmap Program

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