**Operations Manual: Common Systems a for Small Business**

Creating an operations manual doesn’t have to be too complex. However, we want to have our systems written down so that our staff can follow them and when in doubt can refer to the manual to refresh or find solutions to their problem. If you have certain processes that are not listed here, add a section and write down the steps necessary for someone to follow them if you are not there. Once you have written the steps, get someone else involved in the business to review them for you.

**Mission Vision Values:** Put them right at the start

**The Basics:**

Opening the business

Closing at the end of the day

**Customer Service System:**

Greeting the customer

Answering the phone

Servicing the customer

Dealing with customer Service Complaints

Following up with the customer- CRM system

**Sales System:**

Approaching prospects

Identifying the customers’ needs

Developing customer relationships

How to determine customer budgets

Ensuring we are talking to the right people

Closing

Payment options

Handling objections

**Accounts Receivable System:**

Opening customer accounts guidelines

Monitoring accounts receivable

Sending account statements

The overdue process

Handling delinquent accounts

**Accounts Payable System:**

Checking off the Invoice

Receiving the product into our computer system

Preparing the invoice for payment

Guide for payment timeline – To ensure our cash flow

Payment process

**Inventory System:**

Ordering guidelines

Receiving process

Inventory storage

Inventory rotation

Inventory maintenance

**Human Resources System:**

Organizational Reporting Chart

Our Hiring Process

Our Onboarding/ Training Process and timelines

Probation timelines

Our Scheduling System

Our Policy Manual

Staff Meetings

Staff Reviews

Our warning system

Our termination process

**Computer System**

Training for use of our computers

Maintenance: Who maintains our computers?

Backup procedures

Security procedures

**Emergency System:**

Who to call and when

Dealing with Theft/Shoplifting

**Maintenance Systems:**

Who does our repairs?

Janitorial expectations

**Note:** Please add any section that you think you need to make your operations manual really valuable. You probably have much of this written down already, by putting it in one place and calling it an operations manual you centralize the systems and ensure that your staff can find it when they need it.

Finally, it is a good idea to have a sheet for each Key employee listing when and what they do and how they do it so that if something happens to them that you can have something to refer to:

Staff Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_

Role in the Business\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

List what you are responsible for:

What does your week look like: List the things you do on each day of the week so that if you are not here for any reason, someone can cover for you.

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Saturday:

Sunday:

Key Companies that I deal with:

Name: Contact:

Notes: