



In this lesson, you'll learn how to create standard operating procedures. The concept of SOPs might initially sound boring, but the benefits they offer are motivational in and of themselves.

Why SOPs?

- Training— SOPs give you the framework to quickly train your team. This is especially helpful during a startup's promotional period.
- Operations— Production happens smoothly when you have documented standards.
- Value— Strong procedures increase your company's perceived value when it's time to sell.
- Sanity— No need for repeated explanations of the whys and wherefores. Someone needs an answer? They can look it up.
- Continuity— If someone misses work, everyone else knows what needs to be done.
- Scaling— Without procedures, it's impossible to scale your business when it's time to grow.
- Objectivity— Standard operating procedures do not have bad days. They don't mince words, and those words don't devolve during a slump.

What Makes a Good Procedure?

- No Creativity— Job descriptions might allow subjective latitude, but SOPs are different and do not exist to foster creativity. They are the framework for your processes, so avoid language that allows someone to make choices outside of your intention.
- Step-By-Step— Give exact, clear steps. Break it down to black-and-white, bulleted lists to keep it simple. No rambling paragraphs.



- Transfer— Anyone should be able to do it. Build your SOPs so that any team member, regardless of experience, could pick it up instantly, using nothing but your procedures. Make no assumptions of what people would know.
- Format— Consider your audience and choose a format you are good at, whether it is video, screenshots, text, or a combination.

Tools

There are several softwares that aid SOP development.

- Jing—Jing is a free plug-in that allows you to capture images and videos. Because it's in FMV format, which is difficult to save or download, Jing is ideal for short, one-off demonstrations.
- Dropbox—Dropbox is a great cloud folder service. It's the best place to store your finished SOPs.
- Camtasia—Camtasia is video screen-capture software that allows you to zoom in on certain parts of each image. It requires more time and effort in editing, but creates some super slick media.
- Snapz Pro X.—Snapz Pro X is like Camtasia, but a little cheaper. Like Camtasia, it will save high quality MOV files, which can be uploaded to YouTube or other video hosting account.
- Google Docs—Spreadsheets, word processing documents, and slide presentations. It's a great place to store working files because they are automatically saved as you edit.
- Microphone—Quality sound makes a big difference. I regret not splurging \$20-30 on a nice microphone. If you prefer otherwise, simply use your iPhone, headphones, or built-in microphone.



4 Part System for Creating SOPs

1. Identify the part of your business that you want to create the procedure for. Scales can range from small to large—for example: writing reports, hiring developers, choosing source codes, timing updates, measuring analytics, etc. Consider what parts of your business could be outsourced. Write down everything you did yesterday and the day before.
2. Break those down into even smaller steps. How did it happen? Who did you talk to? What programs did you use? What size was it? As you break it down, write it down.
3. Review to see what you missed. Curate and polish your list.
4. Jump quickly into a practice recording. Open Jing or whatever screencast software you choose and press Record. Put on your microphone and start talking. Describe out loud, step-by-step, what the person will do, to coincidentally jog your memory on what's missing from your document.

Keep it simple. Don't overwhelm the person who is trying to learn this for the first time. Videos should be only 1-3 minutes. Remember to assume nothing. That will make a huge difference.

Creating The Collection

Initial setups allow you to finish quickly and move forward, all while allowing other employees to work out the kinks and fill in the gaps.

Your form options are PDFs, documents, videos, or a combination. The most important aspect is organization —make it so that someone can easily find and understand the information presented. Make sure to:

1. Create a Word document that has all the links, logins, and passwords that this person will need. Mention incidentals that might throw them off. Describe expected results of each action and describe the ultimate end result.



2. Save it in a DropBox folder that is logically named and easy to find.
3. Record a video of the steps listed in your Word doc. Save in the same DropBox folder.
4. Ask your employee to walk through each and review its usability.
5. Fix any issues.
6. Create subfolders in your Dropbox account for screenshots that add deeper detail of the most important steps.
7. Have that same employee use the final document and video to create those screenshots with arrows, comment notes, etc.
8. Have a second employee verify the complete package usability.
9. Repeat for every procedure.

Having your early employees participate in this process is an intelligent use of their time. It will solidify their understanding of how their company works and enable them to pyramid train each new round of employees, which ensures consistency in practices as your organization grows.