

STANDARD OPERATING PROCEDURES MADE EASY

STANDARD OPERATING PROCEDURES MADE EASY

Train Your Team Faster and Increase Quality and Profits with Step-Step Procedures for Your Business



Deanna Maio

www.DelegatedtoDone.com

www.DelegatedtoDone.com

Deanna Maio



2111
Y2A3

<http://www.DelegatedToDone.com>

© All Rights Reserved

**NOTICE: You Do NOT Have the Right
to Reprint or Resell this Report!**

**You Also MAY NOT Give Away,
Sell or Share the Content Herein**

The purpose of this report is to educate, and not to provide or imply such provision of any legal, accounting, or other form of business advice. The author and publisher does not warrant that the information contained in this report is fully complete and shall not be responsible for any errors, omissions, or contradictory information in this report.

The author and publisher assumes no liability or responsibility to any person or entity with respect to any loss or damage caused or alleged to be caused directly or indirectly by this report. The reader assumes responsibility for the use of these materials and information.

Any perceived slights of specific people or organizations are unintentional.

You should assume that this report has an affiliate relationship with some of the providers of goods and services mentioned in herein and the author may be compensated when you purchase. You should always perform due diligence before buying goods or services from anyone via the Internet or offline.

Individual results may vary and there are no guarantees expressed or implied. Each individual's success depends on his/her dedication, motivation, and background. As with any business endeavor, there is an inherent risk of loss of capital and there is no guarantee that you will earn any money.

You have a "personal use" license to this report. You cannot distribute it to any other individuals or share it on the Internet. It does not include any sort of resale rights or private label licensing whatsoever.

TABLE OF CONTENTS

Introduction.....	3
What Are Standard Operating Procedures and Why Does Your Company Need Them?	5
Identifying Key Areas that Need Standard Operating Procedures	8
Writing Your Standard Operating Procedures	12
How to Avoid Creating Restrictive Standard Operating Procedures.....	16
Reviewing and Revising Your Company's Standard Operating Procedures	19
When Employees Don't Like Your Standard Operating Procedures	22
Standard Operating Procedures for Your Company's Finances	25
Standard Operating Procedures for Human Resources	28
Managing Your Company's Computer and IT Through Standard Operating Procedures	31
Standard Operating Procedures for Freelancers	34
Conclusion.....	37

INTRODUCTION

Consider these scenarios:

1. You just hired a new employee or freelancer. You hand them a checklist and process to follow. You then follow your own checklist to make sure they have all the information they need.
2. You start increasing your production of products to twice what you had before. However, they all have the same high quality since you have a clear process that each person involved must follow.
3. Someone offers to buy your company tomorrow and you just access a few files and folders to put together the financials you need for negotiation.
4. A customer calls asking about a problem they're having. Your customer service desk asks them a set of questions to determine exactly what the problem is, resolving it within minutes.

These are all examples of situations where a standard process or checklist can make the difference between chaos and efficiency. Standardizing certain aspects of your business not only ensures consistency of quality and service, it also gives you peace of mind.

In this report, we're going to cover the basics of creating standard operating procedures in your business. We'll look at:

- The importance of SOPs
- Where you need to create SOPs
- How to write basic SOPs
- Guidelines for working with employees to create, revise and review
- Suggested areas where you can create SOPs

➤ ...and SOPs for Freelancers

What we won't be covering is complicated documents for standardizing things like processes for following medical compliance laws.

This report is designed primarily for small businesses, people managing outsourcers, and those who are new to the whole concept of standard operating procedures.

So put aside your "free-wheeling" spirit for a bit, and let's focus on being as efficient as possible moving forward in your business.

WHAT ARE STANDARD OPERATING PROCEDURES AND WHY DOES YOUR COMPANY NEED THEM?

Standard operating procedures (SOPs) are written instructions that outline and standardize procedures within your company. SOPs are used in every industry in order to keep business practices in accordance with legal, financial, and industry regulations.

In more common language, SOPs are how-to's that cover every aspect of your business. For example, a manufacturing company will have step-by-step manuals for running its machines. Businesses have customer service guides that outline how to deal with customer complaints. Tech companies have troubleshooting guides for when their systems don't work. An SOP can be anything from a detailed written manual with diagrams to a simple picture that shows where a specific item goes in a warehouse.

Why Your Company Needs SOPs

SOPs are essential to any company, whether you're a small startup with a handful of employees or a giant corporation with many branches and departments. Here are the reasons SOPs are so important:

Maintaining Quality Standards

SOPs ensure that every employee is on the same page when it comes to production, marketing and sales, and customer service. This ensures a consistent standard of quality throughout your company. Tasks can be easily delegated to any employee.

Troubleshooting

When problems arise in your business's daily operation, SOPs provide you a roadmap for troubleshooting. Manuals describe how to diagnose and solve problems so that any employee can do it.

No Guesswork

When you have clearly spelled out procedures, this prevents your employees or yourself from making emotional or rash decisions. Problems and conflicts can be solved fairly with no guesswork.

Reduced Learning Curve and Errors

SOPs allow you to train new employees easily. There's less of a learning curve for them. As they learn about your business, they'll make fewer errors. They can then settle into your company more quickly.

A Safe, Healthy Environment

Since your SOPs put you in compliance with all safety and health regulations, they ensure a healthier, safer workplace. They also protect your company legally in cases of liability.

Government Regulations

SOPs keep you in accordance with regulations and laws. They're easy to update when laws change. If there is a sudden inspection of your company, everything will be in order. Clients and customers may also investigate your company, and if you can show them this documentation, it helps to engender trust.

Financial Considerations

Your SOPs make managing finances, handling bookkeeping, and filing taxes much easier.

Finally, SOPs make your company more dynamic. It's easy to change company procedures and regulations when they're all well documented and easily accessible to your employees.

More Value for Your Company

All of the above benefits offer a further benefit for your company – they make your company more profitable by making it more efficient. This in turn adds value to your company which is passed on to clients and customers. This added value helps if you choose to sell the company in the future, and it helps you secure funding when you need it. Financial lenders nearly always look at SOPs when considering a company for a loan.

SOPs Can't Cover Everything

SOPs differ from one business to another even within the same industry. However, your standard operating procedures can't cover everything completely (although they should strive to). Because of this, make sure everyone in your company has a good understanding of company vision, mission, and values so that they can make the right decision when one needs to be made.

IDENTIFYING KEY AREAS THAT NEED STANDARD OPERATING PROCEDURES

Creating standard operating procedures for your business is all about systematizing and documenting its processes. This should be done for all processes possible in all functions of your business. The basics of your SOPs should be in place before your business begins its operations, though you'll be updating them as your business evolves.

To create your SOPs, start by considering the key areas in which you need them.

Production and Operations

The steps in producing your products or implementing your services should be outlined in detail in your SOPs. Be sure to include maintenance and inspection of all equipment and tools used. Your standard operating procedures should also include managing files, data, and any other information you use.

Human Resources

Hiring and managing employees is an area in which detailed SOPs are essential. Start by outlining your recruiting procedures. Include the process of writing and posting ads, contacting applicants, and setting up interviews. Orientation and training of new hires, including manuals and other materials they will receive, should be standardized. Create clear guidelines for performance evaluation, employee conflicts, and corrective action.

Communications

You need SOPs for handling communications in your office or other workplace. This includes things like answering and directing calls, sending interoffice memos, sending and managing emails, and handling client and customer data within the company.

Marketing and Sales

Marketing and sales are your business's external communications. This area includes press releases, social media, advertisements, communication with the press, and online marketing. It also includes talking with customers or clients about your products or services; things like preparing sales quotes and proposals, negotiating, and following up. Who handles what, information that must be communicated, and how marketing and sales are tracked should certainly be included in your SOPs.

Customer Service

Customer service is another key area that needs to be standardized to ensure that customers are treated fairly. You may choose to include in your standard operating procedures things like response time to inquiries, delivery time and method of services or products, warranties, returns and refunds, dealing with customer complaints, and reputation management.

Financial Operations

All financial processes should be included in your standard operating procedures. This includes taking payments, billing, collections, invoices, and tax information. Financial SOPs are especially important because lenders will look at this information when considering your company for loans. SOPs will also make filing taxes much easier.

Legal Operations

Your legal SOPs guarantee that your company is operating fully within the law. One major consideration to include here is privacy. Outline what information you collect, what you share and with whom, how it is kept private, and measures you take to ensure this privacy. Accessibility is another key area. These SOPs ensure that your company is compliant with laws such as access requirements for the disabled and disaster preparedness.

Computers and IT

Standard operating procedures that mandate how computers are used in your company and how its system is kept secure should also be included. Create clear guidelines regarding how employees can use the Internet.

Finally, you should have a system for ensuring that your SOPs are being followed. SOPs don't help if no one actually reads them. Put a system in place to ensure that your SOPs are being read, and conduct regular audits and reviews to make improvements to them.

WRITING YOUR STANDARD OPERATING PROCEDURES

Once you've decided on key areas where your company needs standard operating procedures, it's time to write them. While this seems simple enough, once you start writing, you'll see that these procedures can be quite complex. A bit of planning beforehand makes writing your SOPs much easier.

Linear vs. Parallel Tasks

All of the tasks that your SOPs outline should be divided into two categories: linear and parallel tasks. Linear tasks are those that need to be followed in order; first, you do Step A and then Step B, and so on. An example would be negotiating with a client and then invoicing them for the job. Negotiations need to be finished before you can submit an invoice.

Parallel tasks, on the other hand, are those that can be done simultaneously. An example of two parallel tasks would be editing a book while the graphics are being created. They can be done at the same time independently of each other.

Grouping by Skillset

Take all of your tasks and put them into categories by skillset, not by employee position or title. The tasks that are currently being handled by one person may in the future be handled by many people, and vice versa. For example, if you have a

content writer who also edits your webinars, these are two different skillsets, even though right now they are handled by one person. Create skillsets that are as narrowly defined as possible.

Writing Steps

Start by breaking down each task into the smallest steps possible. Describe each step in as much detail as possible using simple words. Read back over your steps and imagine you know nothing about the company, or ask someone else to read over what you've written and check for how easily it can be understood.

Here is a basic template for writing SOPs:

- **Introduction and Overview.** What is the task? What is its goal? What access or tools are required to complete the task?
- **Procedure.** Detailed steps to complete the process.
- **Administrative Information.** Who is responsible for reviewing and updating this SOP? When was it last reviewed and updated?

It's a good idea to add a **Frequently Asked Questions** section as well in case the SOP hasn't explained every question on the reader's mind.

SOP Visuals

It's often a good idea to add another format to the text. A few good formats include:

- **Graphic Images.** Graphic images always help to explain the text more clearly by providing an illustration.

- **Flowcharts.** Flowcharts are especially good for complex tasks that require many decisions or troubleshooting.

- **Hierarchy Steps.** Hierarchy steps help employee by establishing priority. The conditions at the bottom of the hierarchy must be met first before they can move up toward the top.

Your SOPs should also be organized using a visual index system. For example, use different colored folders for different task categories or departments.

An Ongoing Process

SOPs need to be reviewed periodically. They should be reviewed at least once a year, but more often is better. After you implement your SOPs, weaknesses will emerge that you can improve. You should also seek feedback from employees for making improvements. A system for reviewing and updating SOPs needs to be put in place.

Outsourcing SOP Creation

It's often difficult to write out detailed instructions for a task that you know extremely well. It may be a good idea to outsource some of your SOP creation. Ask someone to observe your work processes and write the steps for you. You can then review and make any necessary changes.

HOW TO AVOID CREATING RESTRICTIVE STANDARD OPERATING PROCEDURES

Standard operating procedures are necessary because they put all of your company's employees on the same page. The downside is that SOPs can be too restrictive and prevent your employees from being flexible when decisions need to be made. Your employees shouldn't just be cogs in a machine. They still need to use their own judgment, and companies generally benefit from their employees' creativity and innovation. The key is to write SOPs that are detailed and thorough, but also allow for flexibility.

Job Considerations

There are some jobs that require more creativity than others. While a strictly outlined procedure may work well on a factory line, designers and other creative types that work for your company will need to rely more on their own judgment. For these job positions, general guidelines may work better. For example, you can tell writers to write compelling ad copy and give them some of the information they need without telling them exactly how to do it or what to say.

Some tasks require more standardization than others. For example, the way your employees should handle customer complaints is something you probably want to regulate very strictly to make sure errors aren't made and all customers are treated fairly.

Flowcharts for Decision Making

Flowcharts offer a good in-between option by providing instructions and questions. By answering the given question, the employee is directed to the next set of instructions and questions. These can be objective questions such as, 'Is the valve turned on?' or subjective questions like, 'Does the customer have a legitimate concern?' Questions like the latter allow the employee to use his or her own judgment while still sticking to the procedure.

Examples for Clarification

You can teach your employees to better understand your company's vision and help them learn to use their own judgment by providing examples with your SOPs. For creative job positions, give examples of what you consider to be good work. In dealing with customer service, safety issues, or other regular processes, provide stories for your employees. These stories can show what is good customer service, what is a safe manner of operation, and so on.

Include a Review Process

Where there is leeway needed for employees to carry out tasks, include in your SOPs a review process. With a review process, a manager observes the employees in their work and offers pointers on how to do it better. These pointers should be put into writing and given to the employees to use along with regular SOPs. Through this process, each employee gets a customized manual to work with.

Rely on Feedback

The best way to judge whether your SOPs are restrictive or not is to seek feedback from employees and managers. Encourage employees to tell you if they feel stifled or unsure of what to do. Include in your SOPs a standardized review process for receiving this feedback and making changes.

REVIEWING AND REVISING YOUR COMPANY'S STANDARD OPERATING PROCEDURES

After your standard operating procedures are written, they need to be reviewed carefully before they're published. Even after they're published, reviewing and revising SOPs is an ongoing process. There should be a standardized review process in place for both the initial review and regular reviews.

The Initial Review

Before SOPs are implemented, they need to be reviewed and tested. Most large companies have quality assurance (QA) managers, part of whose job it is to review SOPs before they're published. If your company doesn't have QA managers, your SOPs can be reviewed by regular managers, other employees, or colleagues. Obviously, if you're a very small business you're probably going to be doing the review yourself.

The reviewer will be looking for several things. First of all, SOPs should be accurate, easy to understand, and factual rather than opinion based. They need to outline their processes completely and shouldn't be repetitive. Overall, an SOP needs to meet its planned objective: to describe how X task should be performed.

The reviewer reads the SOP and takes notes on anything he or she feels needs to be revised. The SOP is then sent back to the author, who makes the revisions. Each company has a different procedure for the review process and many companies

have multiple reviews. The author may submit the SOPs to several reviewers before it's considered complete. Some companies have an SOP committee that does the final review before the SOP is published. In a small company, this is done by the owner or a general manager.

Regular Standard Operating Procedure Reviews

SOPs are never finished. Rather, they are works in progress, because conditions are always changing. A company may change its policies or procedures, or new laws, regulations, or market changes may require updates to the SOPs. Your company needs to have an SOP audit and review process in place in which existing SOPs are reviewed. This system is beneficial not only in keeping SOPs up to date, but it also looks good to have a solid review process if your company is audited. Reviews should be done at least bi-annually, but it's good to do them more often.

Your system for reviews should include which SOPs need to be reviewed when and who will review them. Again, many companies have dedicated QA managers or SOP committee members. If this isn't the case for your company, designate a manager or regular employee to do the reviews.

For each SOP, determine whether it is satisfactory, needs revision, or is obsolete. A satisfactory SOP is one that is still accurate and thus needs no revision. Obsolete SOPs should be withdrawn but kept on file somewhere in case they need to be referred to.

Revise the SOPs that need it and then review using the same criteria as above. When one SOP is changed, it may impact other SOPs. This can create inconsistency, which can cause problems for your employees or customers. Determine which SOPs are impacted by the revision and revise accordingly.

After the revision process is complete, the SOP needs to be finalized by updating the administrative section of the SOP with the person who is doing the finalizing, the date, the next date for revision, and any other necessary details. All SOPs need to be finalized, including those that are revised, those that aren't, and those that are withdrawn.

Keep the End Goal in Mind

Whenever reviewing or revising, make sure everyone understands the goal of the SOP. Remember what it is supposed to accomplish. When one SOP undergoes several revisions, it can become misaligned and lead to errors or inconsistencies. An SOP may become irrelevant. Before reviewing an SOP, read its objective to clarify and make sure it achieves its stated purpose.

WHEN EMPLOYEES DON'T LIKE YOUR STANDARD OPERATING PROCEDURES

When you implement or change standard operating procedures, this inevitably changes things for your employees. These changes can sometimes be drastic and affect their daily work. It's only natural that there may be some resistance from your employees to these changes.

There are several reasons your employees may not like SOPs. New rules and regulations tend to rub people the wrong way. Employees may feel that you're taking decision-making power away from them, or that you don't trust them enough to make their own decisions. It may appear to them as a criticism of their work. Some employees feel that they thrive in a casual environment and that standardization stifles them.

For example, if a small company that has never had sales and marketing SOPs before creates SOPs that outline the sales process, this may threaten your sales staff. Even if the SOPs simply document the process without making any changes, the employees may feel like they've been handling things just fine. Why do they need standard procedures? There are things your company can do to mitigate this resistance so that you can get back to business as usual.

Get Employees Involved

Ask your employees to help you create your company's SOPs. Have them document regular procedures they use and offer ideas for improvement. Get employees

involved in the review and editing process as well. Their direct experience will help to create better SOPs, and they'll feel that they are more involved.

The same goes for the review and revision process. Give your regular employees an active role in reviewing and revising SOPs so that they feel empowered and can make the necessary changes. Often they'll find ways to improve the efficiency of a task as they go through the process of reviewing an SOP.

Not Top Down

Communicate well with your employees and make sure they understand that this is not a top-down situation. SOPs are meant to empower them and make their jobs easier, as well as raise the quality of the products and services you offer. Let them know that their input is always welcome and seek their feedback.

Offer Leeway

Make sure your SOPs are not too restrictive. Your employees need some flexibility in order to make their own decisions. In many work situations, you can give them general guidelines to follow along with examples. Reiterate your company's vision and values to help your employees in decision-making, rather than forcing them to adhere to restrictive rules.

When Employees Complain

Keep in mind that when an employee complains about a particular SOP, they may not be simply defensive or resentful. There is a good chance that there is a legitimate problem with the SOP that you, in creating it, did not find. Your employees are the ones on the ground using the procedures you've created, and they can often spot weaknesses quickest. Take each complaint seriously and use it to create better, more efficient SOPs.

STANDARD OPERATING PROCEDURES FOR YOUR COMPANY'S FINANCES

Standard operating procedures should be written to cover every aspect of your company's business, but they're especially important for your business's finances. Financial SOPs need to be clear, detailed, and thorough so that your financial operations are in order. When your company is audited, its SOPs related to finance will be closely inspected. Lenders will also look carefully at your SOPs when considering your company for loans.

Bookkeeping Procedures

All of your company's bookkeeping procedures need to be documented in detail. This includes all expenses, credits, transactions, assets, and liabilities. Procedures should be outlined for creating, reviewing, and documenting budgets.

Payment Policies

How you take payments from customers or clients are an important part of your standard operating procedures. The payment process and any other transactions with third parties, including customers and clients, need to be documented in SOPs.

Management of Account Documents

Make sure that your company's system for managing, organizing, and storing account documents is clearly detailed in your SOPs. These procedures should include all information on how you secure the documents and protect your customers' privacy.

Company Expenses

Financial SOPs should include employee expenses and how they are reimbursed. Your employees need to use company money for travel, supplies, and other work-related expenses. Clarify which expenses are eligible for reimbursement, how your employees get this reimbursement, and how reimbursement records are kept.

Tax Assessments

You need a clear system in your SOPs for recording expenses for tax purposes. Also included should be procedures for storage and management of tax documents. Include the steps for filing and preparing for a tax audit.

Financial Reporting and Analysis

Financial reporting is how your company tells the world how it's performing. This reporting chronicles your business's ups and downs. SOPs should clarify how this regular reporting is done and the measures taken to ensure that it is as accurate as

possible. You might also include a review process and performance appraisal procedures.

Sales and Marketing

Not all companies have sales and marketing SOPs, but it's a good idea to include this area as well. The key is to make sure your sales and marketing procedures are codified while also allowing room for flexibility. The members of your sales staff need to rely on their own skill and experience, not just given guidelines.

Sales and marketing SOPs may include areas such as market research, public relations, marketing methods, tracking sales, advertising, and reputation management. SOPs can cover procedures for specific marketing activities such as direct mail, email marketing, social media, and so on.

The Importance of Financial SOPs

Even if you have only one person in your accounting department, all financial procedures need to be documented. Creating financial SOPs ensures that your company is in compliance with all laws and regulations, and allows it to change easily if these laws and regulations should change.

STANDARD OPERATING PROCEDURES FOR HUMAN RESOURCES

The human resources department (HR) is an important area of any business where procedures and guidelines need to be clearly laid out. This is the department that handles a variety of crucial tasks, such as hiring new employees, ensuring that employees are happy and able to carry out their jobs, and managing conflicts or problems among employees. HR needs to do all of this in accordance with the company's vision and corporate culture. All human resources procedures need to be clearly outlined in standard operating procedures.

Hiring New Employees

One of the human resources department's key responsibilities is hiring new employees. Each step of this process needs to be outlined in SOPs to ensure that the right people are being hired and that they're being treated fairly.

SOPs should outline the writing, placing, and managing of job ads. When an applicant responds to the ads, there must be strict guidelines in place to determine which candidates are called for an interview. If you have more than one person in human resources, there needs to be a system for note-taking so that other employees know whether a person has been contacted or not.

Procedures for interviewing and screening also need to be documented. When and where interviews are conducted, what questions are asked, and management of interview notes all need to be included. Policies for considering applicants, such as

background checks, screening, checking references, and checking certifications are all important as well.

Orientation and Training

Once a new employee is hired, they need to be brought into the company through orientation and training. Orientation includes teaching the new hire about your company's culture and its policies. Materials like employee manuals may be given to them, and they may have to undergo training sessions. How this is done should be included in your SOPs. Even if your company is small and training is somewhat informal, you should put a system in place for tracking new employee progress.

Compensation, insurance, benefits, and payroll policies need be outlined carefully in your SOPs. Be sure to also include how this information is conveyed to new employees.

Employee Progress and Evaluation

Most companies have a system in place for evaluating employees. All of the details of this process should be included in your human resources SOPs. This would include things such as when evaluations occur, who conducts evaluations, how employee performance is evaluated, and how the results are communicated to employees.

Your company's system for promotions and pay raises should also be included in your SOPs. Make sure that these processes allow for some flexibility on the part of managers. This is not an area where your company should be flying on auto-pilot. Your SOPs should allow your managers plenty of leeway.

Firing and Laying off Employees

Termination of employees needs to be clearly codified in your SOPs. If these rules and regulations are in place and clearly spelled out, terminated employees who feel they were treated unfairly will not have a case against your company. Many conflicts of this nature are avoided by having clear SOPs.

Compliance with Regulations

When writing your human resources department SOPs, review government guidelines to make sure you're in compliance with them and include this in your SOPs. The SOPs should clearly show how your company is in accordance with federal requirements such as the American Disabilities Act.

MANAGING YOUR COMPANY'S COMPUTER AND IT NEEDS THROUGH STANDARD OPERATING PROCEDURES

Practically every company on Earth today relies heavily on computers and the Internet for its regular daily functions. Customer transactions, data management, sales and marketing, product manufacturing, and nearly every other aspect of business utilize computer technology. Your company needs to have solid standard operating procedures in place to set ground rules and establish guidelines for how this technology is used.

Internet Use Policy

It's likely that most of your employees are using the Internet throughout the day. The Internet is full of bad neighborhoods and distractions. Your company's SOPs need to clearly state what is allowed and what is not allowed at work. For example, casual Internet surfing at certain times throughout the day may be acceptable, but the use of personal email is not.

Create your Internet use policy SOPs with security in mind. Set restrictions on what files can be downloaded or shared online, not only for the sake of employee productivity, but for company security.

Hardware and Software Management

There are maintenance tasks to keep your hardware up to date and manage any software that your company uses. Some programs need to be evaluated from time to time. Most types of software have occasional upgrades. Your SOPs should outline how these programs are to be maintained and kept running smoothly.

Your hardware and software management SOPs should also include rules about access to software. Certain employees need access to certain programs while others don't. Access considerations should include password management.

Tech Troubleshooting

With computers, things inevitably go wrong sometimes. With clear troubleshooting SOPs, any tech-related problem can be handled by any employee. Your company doesn't need its own IT department to handle a vast majority of computer related problems. Create SOPs so that any employee can handle these problems. Flow charts work particularly well for troubleshooting tech problems.

Security Training

Included in either your security or your human resources SOPs (preferably both) should be training for all employees on security processes. This may include a bit of training on computer systems. Employees need to have a basic understanding of how data is kept safe.

Computer and IT Security

Since much of what companies today do revolves around the computer and Internet technology, it is vitally important to make sure all data and networks are safe. Security guidelines should be clearly explained in SOPs. This is important not only for keeping your company safe from attacks, but also for showing potential investors or auditors that you're on top of your security needs.

All security related processes should be covered in your SOPs. This includes things like managing passwords and access, periodically changing passwords, conducting in-company security audits, upgrading security systems, and making improvements to security systems.

Your security procedures should also include what to do if your company's security is breached. If your network is attacked, all of your employees need to know exactly what to do and be able to act immediately.

STANDARD OPERATING PROCEDURES FOR FREELANCERS

All businesses, whether great or small, need standard operating procedures (SOPs) to codify their business processes. If you're a freelancer, you are a small business of one. Although you don't have employees that need to be kept on the same page (although in the future you may), it's still good to have SOPs in place to increase your efficiency and make your freelancing business more established and legitimate.

The Benefits of SOPs for Freelancers

There are a number of reasons your freelance business can benefit from SOPs.

- Standard procedures help you get the work done in an organized and efficient way.
- SOPs ensure a standard level of quality for your services.
- With SOPs, the sales process is smoother and all of your clients and customers will be treated equally.
- When you find yourself ready to hire employees or outsource, your procedures will already be outlined for them.

All of the above benefits lead to a more sustainable and profitable business.

Getting the Ball Rolling

Creating SOPs isn't something you have to do before you get your freelancing business off the ground. In fact, even if you have outlined a few basic processes beforehand, they are bound to change after your business has been operating for a while. Your freelancing experience is going to inform your standard procedures, and you'll need to draw on that experience to write good SOPs.

Also, clearly defined procedures can stifle the creativity and flexibility that you need to get started as a freelancer. Wait until things settle into routines, and then you'll understand what needs to be outlined and exactly how.

Areas to Standardize

The best possible scenario is to create SOPs for everything you do. But for freelancers, time is especially precious, so this is not always possible. Here are some areas in which you may want to create SOPs.

THE SALES PROCESS

Your SOPs can cover standard rates and pricing structures and guidelines on how to communicate with customers. You might want to create procedures for accepting or turning down jobs.

MARKETING

Any regular marketing you do can be outlined in SOPs. This could range from things like email marketing broadcasts, blog posting, and website updates to social media activity, posting of ads, and so on.

WORKFLOW

Many freelancers manage multiple jobs, so creating procedures to manage workflow is very important. You may want to create SOPs for handling deadlines, establishing priority, or what times you work on certain regular jobs.

ACCOUNTS AND BILLING

If you're going to standardize only one area, this is the one to do. It's much easier to run your freelancing business when all of your financial processes are clearly outlined. This includes taking payments, financial transactions, business expenses, managing recurring payments, paying taxes, audits, and so on.

Writing Freelancer SOPs

For yourself, create simple documents that describe your company's essential processes. When it comes time to outsource or hire others, touch up these documents, adding detail and making sure they're clear and accurate. Remember that documents that make sense to you may not make sense to others.

Content Options

SOPs don't have to be exclusively text-based. In fact, they benefit from visuals and other added content. You can create your SOPs in whichever format you like or in multiple formats, such as audio or video. When outsourcing, you can give your assistants these videos to use as tutorials along with the text for reference.

Reviewing Your SOPs

Businesses review and revise their SOPs on a regular basis, usually quarterly or bi-annually. As a freelancer, you may not want to spend a great deal of time on this. When you become aware that a procedure has changed, update the SOP. Before outsourcing, review everything. As long as things are going well, your SOPs don't need a great deal of attention. However, if your freelance business isn't running as smoothly or efficiently as you'd like, it is probably time for review.

CONCLUSION

Along with this report, you'll find a **Standard Operating Procedures Directory** which lists a number of common areas in which businesses create SOPs. Depending on the size and nature of your business, you certainly won't be creating documents for all of these. Focus on the ones that make most sense to the smooth running of your own business and work on those first.

In addition, there's a **Standard Operating Procedures Template**. You can use this as a guideline for creating your own SOP documents, or use the document itself as a template. Eliminate or add to it as necessary. You'll find templates for checklists at the end of the main SOP template.

However, just because we've provided a template doesn't mean all SOPs require a document like that. Evaluate your own processes before you decide on a format for your SOP. A simple flowchart could be all that's needed.

Finally, creating your standard operating procedures sounds like a tedious task on the surface, but it's essential to the efficient operations of any successful business. Don't put it off for long, especially if you find the same mistakes being made over and over in certain areas.