

Operations and Training Manual Overview

Welcome!

An effective Operations and Training Manual will save you time, energy, and money because you'll be leveraging the power of systems in your business. The fundamental principle is this:

“Every time you do a task without updating your Operating and Training Manual, you can be sure that you'll find yourself doing it again...”

Virtually everything you do in your business can be systemized and done by other people if create entries in your Operations and Training Manual. Rather than employing more people to get things done, look for ways to systematize what you do to improve consistency and efficiency.

Here are guidelines for creating an Operations and Training Manual in your business...

1. Create a list of tasks being done in your business using the Task Checklist below as a starting point.
2. Flowchart you're business processes so your team can see how all the tasks fits together.
3. Decide which of your tasks to systematize first based on your Time Management Plan. What tasks have you been doing that a lower paid team member could be doing if it were documented in your Operations and Training Manual? Once you document it and hand it over to a lower paid team member, you can spend your time on higher priority tasks.
4. For the tasks being done by other team members, have the team member responsible for each task write down a step-by-step explanation of how they do it.
5. Then, have another person do the task based on the step-by-step explanation and add clarifying steps to the manual as necessary. Have another person do the task without intervention to make sure the step-by-step explanation is complete enough.
6. Don't over complicate systems or people won't follow them. You can use pictures, snapshots of computer screens, or videos of people doing the tasks. This will make the systems much easier to follow.

7. Allow the manual to change and grow with use. Make sure your team members keep the Operations and Training Manual current and that everyone knows where it's kept!

OTM Task Checklist

Management Tasks

- Company 1 Page Strategic Plan (vision, mission, values, goals)
- Company organizational chart
- Team member position descriptions, positional contracts, goals, and key performance indicators
- Recruitment system
- Induction program
- Team member training
- Leadership development and career planning
- Conflict resolution
- Contingency staffing plans
- Redundancy systems

Product Research and Development Tasks

- Developing products, intellectual property
- Developing packaging and collateral material such as catalogues, etc.
- Developing lean manufacturing methods and process
- Developing manufacturing costing and bidding process

Sales and Marketing Tasks

- Create and manage tactical marketing plan
- Create and manage sales management system
- Designing and producing promotional materials
- Developing leads and prospects
- Creating an advertising plan
- Creating a public relations plan
- Creating a direct mail plan
- Developing and maintaining a database
- Developing and maintaining a website

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- ❑ Analyzing and tracking sales KPI's
- ❑ Continuously measure number and origin of all leads
- ❑ Measure conversion rate and average transaction value for each salesperson
- ❑ Measure average transaction value for every customer
- ❑ Measure profit margins for each product or service

Order Processing and Tracking Tasks

- ❑ Taking order and record orders by mail, fax, phone or online
- ❑ Fulfilling and packaging the orders
- ❑ Confirming details before service or product delivery
- ❑ Sending the orders
- ❑ Management system for freight, couriers and vehicles
- ❑ Maintain order tracking systems

Manufacturing and Inventory Tasks

- ❑ Selecting vendors
- ❑ Maintenance of equipment
- ❑ Determining product or service warranties offered
- ❑ Establish product or service pricing (retail and wholesale)
- ❑ Establishing reorder process for inventory production
- ❑ Receiving and storing product as inventory
- ❑ Reconciling physical inventory with accounting records

Customer Service Tasks

- ❑ Returns procedure for inventory receiving and customer payment return
- ❑ Responding to customer complaints
- ❑ Replacing defective product or performing other warranty service
- ❑ Measure quality and professionalism of service delivery

Finance, Accounting, Legal Tasks

- ❑ Managing the accounting process with daily, weekly, monthly, quarterly and annual reports
- ❑ Complete and manage monthly and yearly budgets and forecasts

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BUSINESS COACHING

- ❑ Complete weekly income statement
- ❑ Complete a monthly balance sheet
- ❑ Update daily or weekly cash flow statements
- ❑ Managing cash with future borrowing needs secured and available
- ❑ Reporting and depositing payroll taxes and withholding payments
- ❑ Complete weekly bank reconciliation
- ❑ Daily banking activities
- ❑ Maintaining an asset register including depreciation

Invoicing and Accounts Receivable Tasks

- ❑ Invoicing customers for the orders
- ❑ Receiving payments for the orders and crediting customers for payment (cash, check, or credit card)
- ❑ Monitoring credit control and age of accounts
- ❑ Starting the collection process for outstanding receivables

Accounts Payable Tasks

- ❑ Payroll processing
- ❑ Purchasing procedures and approvals required
- ❑ Payment process for supplies and inventory
- ❑ Petty cash

Corporate Entity Tasks

- ❑ Negotiating, drafting and executing contracts
- ❑ Developing and protecting intellectual property
- ❑ Managing insurance needs and coverage
- ❑ Reporting and paying federal, state and other taxes
- ❑ Planning for federal, state and other taxes
- ❑ Managing and storing records
- ❑ Maintaining investor/shareholder relations
- ❑ Information flow processes
- ❑ Ensuring legal security
- ❑ Developing a business plan for planning and managing growth

Daily Office Physical Space Management Tasks

- ❑ Answering the telephone
- ❑ Receiving and opening the mail
- ❑ Purchasing and maintaining office supplies and equipment
- ❑ Faxing and e-mailing
- ❑ Dealing with incoming/outgoing delivery needs
- ❑ Backing up and archiving data
- ❑ Maintaining and designing telephone and electrical systems
- ❑ Upgrading office equipment
- ❑ Planning permits and fees
- ❑ Licensing
- ❑ Ensuring physical security