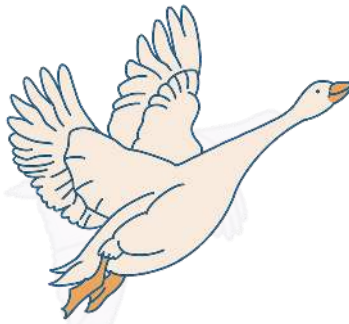


Quickstart Guide to Creating SOPs

Use SOPs (Standard Operating Procedure) to save time and money.



With Karl Staib of Dig to Fly

This is the Quick start guide to creating SOPs (Standard Operating Procedures) that don't suck and help you grow your business. It's one of the first ways to begin getting help in your business. They can be as easy as recording your screen as you go through the process with step-by-step instructions. You can do this for all the repetitive tasks you do in your business. You want to make sure each task is done at a high level of quality. This start of scaling your business and developing consistent outputs.

Time required: When capturing a task, make sure it takes less than 10 minutes to complete. If the task takes longer than 10 minutes, break it into smaller chunks.

Why: Use this quick start guide to develop your processes so that each step is consistent, reliable and digestible when someone is ready to learn the task.

Before creating an SOP, we must understand why we are creating them. When we understand the why behind it, the good habit quickly follows.

You and your employees should have guidelines to create an SOP that follows four rules.

I call it the R.E.A.D. method.

1. **Reliable:** Develop your SOPs so people can trust them. You want reliable SOPs that people feel comfortable following and get good results.
2. **Easy:** Make it easy to use. A complicated SOP encourages people to avoid the SOP and that's exactly what you don't want
3. **Accessible:** Save it where everyone has access and can update it.
4. **Durable:** You don't let it collect dust. Create a process around reviewing SOPs so they are durable over many years.

Guidelines

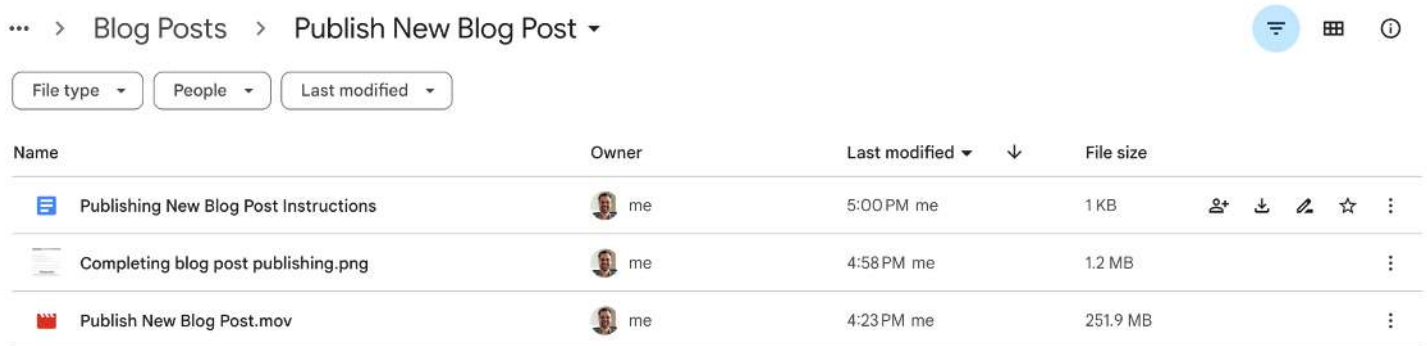
- ❖ Understand why this task is important and how it fits into the larger vision of the company.
- ❖ Name everything that is a part of the SOP. Use consistent naming conventions so anyone can navigate your SOP library.
- ❖ Follow the structure in this guide. This will ensure consistency.
- ❖ Use recording software that creates a transcription. That transcription will help you create the written document that will go along with the video.
- ❖ If this is an analog process, then the best practice is to write down the process as you do it.
- ❖ Always include a brief overview of your process so people have context and a deeper understanding of why it was developed before learning the task.
- ❖ Review the process to ensure it's as simple and not complex.
- ❖ Have an outsider review your SOP to ensure they understand each step and can easily learn the new task.

Tools:

You can use many different tools to capture and track your POAs. Many of my clients use various combinations of Google Docs, Dropbox, Jira, Rally, Box, Kajabi, Asana, Clickup, Trello, etc. You can use most of the tools that you are currently using, as long as everyone understand how to use them and has access to them.

Step 1: Set Up Your SOP

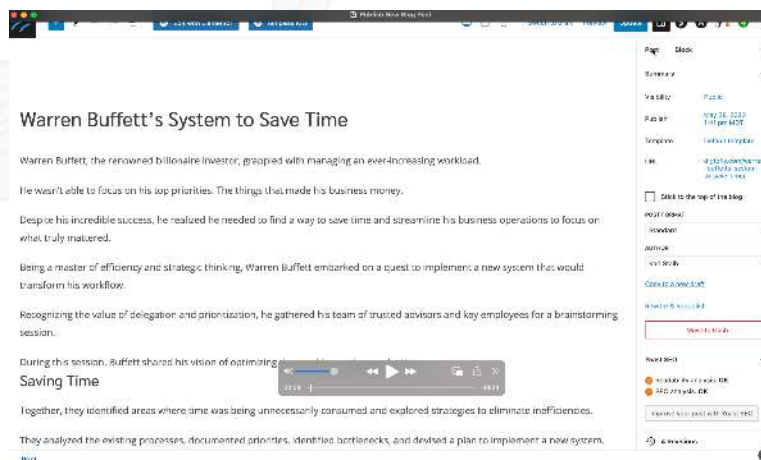
- ☐ Start with title your SOP in the format that you've created for your SOP process.
- ☐ Create new folder or post if this is part of a target process.
- ☐ Create a new document, card, post in your platform of choice.



Name	Owner	Last modified	File size
Publishing New Blog Post Instructions	me	5:00 PM me	1 KB
Completing blog post publishing.png	me	4:58 PM me	1.2 MB
Publish New Blog Post.mov	me	4:23 PM me	251.9 MB

Step 2: Capture Your Process

- ☐ Record the step-by-step process. If it's a digital process use screen share (Loom, Quicktime, etc.) to record your screen and talk through each step and write down the processes in a document. If this is an analog process then write down each step as you go through the process. If possible try to take photos of each important step of the process
- ☐ Upload video and document, or just document with images (analog processes) to your shared storage system like Google Drive, Dropbox, Box, Amazon, etc.



Warren Buffett's System to Save Time

Warren Buffett, the renowned billionaire investor, grappled with managing an ever-increasing workload. He wasn't able to focus on his top priorities. The things that made his business money.

Despite his incredible success, he realized he needed to find a way to save time and streamline his business operations to focus on what truly mattered.

Being a master of efficiency and strategic thinking, Warren Buffett embarked on a quest to implement a new system that would transform his workflow.

Recognizing the value of delegation and prioritization, he gathered his team of trusted advisors and key employees for a brainstorming session.

During this session, Buffett shared his vision of optimizing his workflow. He identified areas where time was being unnecessarily consumed and explored strategies to eliminate inefficiencies.

Together, they identified areas where time was being unnecessarily consumed and explored strategies to eliminate inefficiencies.

They analyzed the existing processes, documented priorities, identified bottlenecks, and devised a plan to implement a new system.

Step 3: Review Instructions

- ☐ Break down the step-by-step instructions in a high-level section above video or document.
- ☐ Add screenshots and/or photos to document stored in central location and everyone has access to like Google doc, Box, Dropbox, etc.
- ☐ Include any relevant login details in the SOP.
- ☐ Add hyper links to document for quick access to appropriate tools

Step 4: Review

- ☐ Review SOP yourself to make sure you made it simple and easy to follow.
- ☐ Have someone with an outsider perspective review SOP so you make sure you've captured everything that is needed.
- ☐ Update based on feedback from the person who reviewed SOP.

Step 5: Publish

- ☐ Publish your SOP to the appropriate folder, and use the standard naming convention.

I hope you enjoyed this quick start guide to developing your SOPs, so you can free up more time and money to focus on the important things in your business. If you have any issues, please reach out to me and we can set-up a time to chat about how you can optimize SOPs so they are reliable, easy, accessible and durable at any stage of your company.

As you add SOPs, you'll notice ways to improve your process. This is natural, and don't get discouraged if it takes some time for people to get up to speed with creating SOPs for their routine tasks. I've saved myself and companies a lot of money by helping them develop these systems. With a little planning and focus, I know it will help you too.

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