
Operations Manual

To operate efficiently, every business, no matter what size, should have their operational procedures and policies documented in an operations manual. This forms the blue print of what your business is, and provides a clear way of dealing with the various operational aspects of your business for your staff. Aspects of your operations manual will also be useful for your induction manual for new staff, and help ensure your business continues to operate effectively if you or key staff are not there.

Operations manuals differ, so there is no specific formula to follow. What you do however want to achieve is documentation of how things are done within your business. For example, how do you like customers greeted when they come in the door, or what day of the month do you order supplies, or what is the process for following up debts?

Some procedures manuals contain all information about the business – i.e. company's mission statement, products and services on offer, goals, organisational chart etc. Before you start you need to consider the purpose of your operations manual – is it to develop a comprehensive manual for purpose of franchising for example, or is it purely to document your how to procedures, business-related policies and important contacts? This will determine how in-depth and sensitive the information that is put within the manual.

As a business grows, some companies split their manuals into different departments, divisions or functions.

The key to getting started is to think about everything the business does on a daily basis and put this into a category, providing very specific instructions that anyone can understand – e.g.

- Organisation – covering everything that is involved in your daily operations, from who is opening up the business, and how this should be done, to answering the phone, greeting customers and making a sale, through to closing the business at the end of the day.
- Marketing/sales – information on where and how often you order business cards, brochures and marketing materials through to lead generation, customer details, follow up and customer service.
- People – everything relating to your staff, from positions, job descriptions, to recording staff details, recruitment, staff policies etc.
- Technology – outlining policies relating to use, instructions on how to use, servicing procedures, and training staff on their use.
- Capital – details relating to financing operations, setting budgets, invoicing and debt procedures, price setting, payroll, building and equipment policies and processes etc.

The type of areas your operational manual might include:

- An introduction, including the purpose of the manual
- Company vision, philosophy and goals
- Contents page
- Administrative processes
 - Reception & customer protocol – face to face and telephone



- Ordering supplies - consider collaboration with like businesses for resources
- Delivery and processing of orders
- Storage
- Mail handling & security
- Computer systems
 - Software
 - Security – including logins
 - Support
- Contacts list

- Accounting procedures
 - Invoice handling
 - Operational aspects of payment
 - Handling unusual situations
 - Filing
 - Debtors processes
 - Credit application
 - Terms and conditions
 - Registration of property/security
 - Credit checking
 - Granting credit
 - Operational aspects of billing
 - Handling unusual situations
 - Debt monitoring
 - Debt collection
 - Refunds
 - Handling complaints

- Opening/start of day processes
 - Opening up
 - Mail collection/delivery
 - Security alarm

- Closing/end of day processes
 - Clean up
 - Banking/tills
 - Locking up

- Stock control
 - Ordering
 - Receipt of delivery
 - Inventory
 - Security
 - Stock take
 - Year to date process
 - Vendor list

- Marketing/promotion
 - Standards/style guide – use of logos, fonts, marketing material, newsletters etc.
 - Decor
 - Product/service 'how to' guides



- Dealing with the media
- Contacts lists
- Human resources
 - Organisational chart
 - Recruiting procedure
 - Internal policies
 - Performance reviews – including goals and KPI's
 - Holidays
 - Warnings and dismissal
 - Applying for leave/sick leave
 - Expense claims
 - Accident reporting
 - Dress standards
 - Culture
 - Training
 - Staff and emergency contact lists
- Pricing
 - Structure – including separate pricing for exports
 - Quotes
 - Discounts
 - Reviews
 - Market research on competition
- Client
 - Database management
 - Handling and recording client enquiries
 - Processing client orders/purchases
 - How to deal with difficult clients
 - Follow up
- Security
 - Maintaining security
 - Process for dealing with break-ins/robbery
 - Cash handling
 - Contacts list
- Health and safety
 - Policies
 - Accident reporting
 - Hazard register
 - Handling health and safety processes



- Emergencies
 - Handling
 - Training
 - Contacts
- Specific instructions for handling equipment and carrying out tasks
- Cleaning and maintenance
 - Equipment
 - Operations
 - Cleaning roster
 - Maintenance
 - Recycling
 - Contacts list
 - Building
 - Cleaning
 - Maintenance processes
 - Contacts list
- Appendix – include forms/template document

