

Sink Handle Episode 45

Hello, everyone, and welcome to Episode 45. So last week, I told you a whole list of reasons why having systems and processes and SOPs in your business is so important. It's important for your growth, because you can do more you can scale, you can delegate things, you can have other people come into your business, as well as just for your sanity, right, like trying to figure out how you did it last time. Figuring out all the things you need to do and having them a little more organized is hugely helpful, especially if you want to go on vacation one day. So this week, I thought it might be helpful to kind of walk you through creating an SOP, just a basic, simple SOP. And all the parts and the steps that I use, there are a ton of different layouts, depending on your industry. But something in like a science field would be much more technical and detailed and have certain kinds of things included that I wouldn't need here. And I have used the same template over and over over the years. I mean, I've kind of pulled them from different places. And I've adjusted things as I've gone to say like, Okay, well, we never use that section or something like that. So at this point, I have this template that I used, I used to create like a million SOPs. I feel like at this point, a lot, a lot of SOPs in my life. So I thought it also would be helpful if I gave you the template for that just to get started. So you can get a free copy of my template for my SOP over at [Reynoldsobm.com](https://reynoldsobm.com) slash Get your act together. It will also be linked on this podcast page for Episode 45. It is free just downloaded, I just want you to get started. Because I think that this is such an important thing to get going on your business so that you can get a little more time and sanity in your life.

Okay, so let's just start this whole process. You're going to have your SOP template. And you're also going to want to record your task. The way I do it, especially when I'm trying to help someone else create SOPs and processes is I ask them to pick a task that's simple and easy to explain. So they can get the hang of like creating SOPs without getting all mucked in. Then the next time they're going to do that task. I asked them to record their screen, and then talk me through it. So for recording, I use a loom loom.com. And I think it's free up to like five minutes now. But there's other software available like Vid Yard and other things like that. So you just want to be able to record your screen, you could probably even do it on zoom, just share your own screen and record yourself if you already have zoom. So whatever it is, record your screen doing the task and talk yourself through it. So you're going to start Okay, we start here, we log in here, and you're just going to walk them through just like if someone was sitting next to you at your like at a desk, which is how I feel like how we always ended a corporate, right, like, someone would just sit at your desk for a week, and that you would show them how to do everything. So this is kind of in lieu of people being in your house, if you work from home. So once you have that recording done of whatever this task is, if you have someone to help you like a VA or a virtual assistant, or an admin, you can give that video to them. And then they can continue with the rest of this process. That's kind of how we do it here. So when we're helping people build out processes and systems, like in our, our system is intensive that VIP day, or just as an ongoing thing, I try to get the knowledge out of their head in the easiest way possible, they make the video, then they send that video to us. And then we either transcribe it, if it's long, which is sometimes faster than having to type everything out. And we use Otter for that. I'll put the links off for all of this stuff in the show notes. So we

use otter, it transcribes everything. And then we take that transcription and then just kind of format it into an SOP and like add in whatever we need, but instead of having to type everything out, and then we put it into this kind of framework on the on the template. So you can either do this, if it's just you in the beginning, or you can hand it off to someone at this point.

Okay, so let me walk you through the SOP template. At the top is going to have the company name, says Reynolds OBM, SOP dash the name of the task. I like to have the name of like company and the task. So everyone's clear what this is just the title of that there because a lot of people are going to print this off. If it's like one of those things, like I process a complicated payroll for one of my clients, I just printed it off and I really literally just follow it along and I've made notes over the years just to have it in front of me because it's easier than trying to switch back and forth. While I'm trying to do something and looking at a different SOP on a different screen, so remember that people are going to want to print this off if you're trying to share it, even to this day, people use printers.

So the first section is prerequisite. So we're going to outline the knowledge, the access to software, what other SOPs or processes you might need to complete the task we're about to do. So do you need access to software? Do you need a password sheet, but you should not use password sheets, you should be using LastPass or something like that encrypted. And let's say you need some kind of information sheet to refer to for this, this section is a good place to link that. That's why I also as a side, I build all of this in Drive. And then you can have links to the other drive sheets or folders or anything else put right into the SOP. So if you need a link to a reference sheet, you can put that link right there, and everything's all in one place, no one has to go searching for whatever it is, or wondering if they have the right sheet. The next section is the purpose policy section. So what are we doing? Why are we doing it and the rules around it? This task fits into the big picture in this way. And it helps to show people how their work fits into the whole. And then is this done weekly? Is this done monthly? Are we talking about? We run a backup on our QuickBooks every month so that we have sound information, whatever the thing is, right? Why are we doing it? And then what are the rules around it? Okay, so the next section is assigned to who is responsible for this task, and then also keeping up with the SOP and the process. So running, the backup on QuickBooks is assigned to Kelly. That way, everyone knows if they go to the textbook, oh, that person is the person that does this. So if anyone has any questions about it, they can go to you. Everyone knows who this is. Also it is makes it very clear as to who is responsible, and who's responsible for the system upkeep. Because if we make an SOP, and we never go back to it, and then QuickBooks has an update, and the buttons are in the different places. Now. checking in and keeping these updated is very helpful. Knowing that that's your responsibility is great. next section is gonna be process. This is the meat of it. Right? The other stuff is like explaining what we're about to do. This is what we're going to do. So I like to lay out the process and the main steps. So like step one, or step two, step three, for step four, are the main big chunks. And then the procedure below will be each chunk each step broken up into all the little steps. So that way, you can look at the process and skim quickly to see like, okay, is this doing, what I need to do is this task SOP covering the thing I need to do, it's a way to look at it quickly. And then the procedure is like, getting into the nitty gritty step one, login passwords can be found in LastPass. Step two, click this button, go here, left side toolbar, like getting into the steps. And really mapping it out.

Every single step, that is the way you're going to get out of the everyday of this, like the meat of all these little tasks. I want you to create these instructions, so that you can hand it to someone who's never done it before. And they can do it. Most people say, Oh, I can't teach this, or I can't delegate it, they won't know how this is how you teach it. This is how you delegate it. This is how they know how. So I write things, so that someone else can come in and do the job. And the whole, you know, the if I get hit by a bus kind of scenario, right? Which, with COVID, and people getting sick, or what if someone in my family got sick, and I had to take care of them, someone else in my businesses can come in, look at this and go without me standing there teaching them. This is the important thing, because a lot of people kind of start in the middle of a conversation. My husband tells me this all the time that I walk in, and I've already had the conversation with myself. I made a conversation with myself, and then I started including him in it. And he's like, he's like, What are you talking about? I have no idea what you're talking about. I just randomly started talking in the middle of a story. A lot of people write instructions the same way.

I love coming into a business and being the person who's like, Yeah, I know you started on Step four, I have no idea where to log in. I have no idea what system we're using. I have no idea what sheet you're referring to. coming in and really starting from step one. Here is where the password can be. Here is what what like what website are we logging into? Some people will start with, okay, go into the system and you're like what system? What are you talking about? Start from the beginning. Then you can hand things off, because if you have everything there, they can just follow along. So this number one is for delegation, two for backup, and three, consistency. If everybody goes through these four steps, every time they do this task, it will be consistent across the board, no matter how who's doing the work. Okay, so after you've gotten all of your instructions and the procedure, you got all the click here to do this part of all your steps. Then at the bottom, you're going to go created by, I'm going to put my name, whoever created this recipe, and the date I created it. And then anytime we update anything, there's also a section says updated by and the date. This is just so that we know how accurate these are. So if we go into the task SOP, and it's created and the date is 2017, probably is a good idea. If we check it, some things will be exactly the same from 2017. And that's fine. But just knowing that like, Oh, no, this just got updated last week, it's fresh. Like that kind of thing. Knowing where we are on this and how accurate it is. When you get really nerdy about it, you can have a process to like everyone kind of checks it on their SOPs monthly, let's say or even yearly. But that's down the line. I don't want to like get too nerdy on you on this. Now, you have your video made, you have your SOP made. Now we have to put it somewhere that it's really easy to find. Like I said, I built everything on a drive, I have an SOP folder. And then I've subfolders for like payroll or accounts receivable or, you know, contractors or whatever, whatever your your folders are, put the recipes there. And then also put the videos there if you can, if you've made a video, link it on the SOP. Like you know, if it's in loom, and it's kind of hosted there, you can either download that and put it into the folder, or you can put the link to the loom video, right in the SOP, like up in the top section. Like the prerequisite section, that way, if someone has a question about the actual SOP, they can watch the video. Like if you're like, click on the blue button, and they're like, what blue button, they can watch the video. And they're like, oh, that blue button. And none of this means they have to come and ask you. All of the information is right here for them. So especially in this online world, where we kind of all work at different times, like my team members, and I work at different times of the day. So if I have to stop on a Saturday afternoon, because they're working on something they want to do work on on a Saturday. And they have a question. Now I have to work on

Saturday afternoon. So if everything is here, I don't think they get to look at the video, they get to see everything there. And they can follow along. And it knocks all of the micromanaging, question answering down to nothing. Then when they're coming in with questions, it's a real question. It's not where's that what's going on? Because that is mind numbing, right? A lot of people don't like managing people. Because of that. We're talking in my agency coaching. With the DOO certification, like that becomes a thing like, Oh, you have to manage all these people. And I'm like, if you have all these systems in place, and the information is there for them, there's a lot less managing. So once you have all of this, you're going to have it all in Drive, or whatever folder system you're using video SOP there. Now if you want to go even further, to make this easy, easy, easy to find, create some kind of tracking sheet just could be an easy spreadsheet that says Like, this is the SOP for getting a backup of QuickBooks, and then the link to it. And then the link to the video even. And then if you need to find somebody, you just go to that sheet, look it up. That's part of what we do here. We created a Get your act together dashboard. That is a little bit more complicated than that. But it's like a home base for all of these things, all your SOPs all your templates, and then also who's responsible for them, when was the last time they were updated with the link to the video, all of that kind of stuff gets built out either as our client were like in our VIP days, that's a big thing we do. We go through like the systems but then create this dashboard. So you can find everything, but you can just start. I want to make this as easy as possible. If you really want to get your business in shape.

Go get the free template, listen to what I just said. And then create a basic spreadsheet that has all your stuff listed on it, all your recipes and the links to them. And you can get really really far with just that. And then if you don't want to do any of this, or you think it's just too much or it's just not your thing. Then come talk to me, then you can look at our Get your act together, systems intensive, or just work with us in some way we can help you get your act together, go out there, start writing things down, just record those videos. Even if you just record the videos and don't get around to the SOP, make that step. Let's go and get five of them, then hire a virtual assistant to just get those five SOPs created. Just start, start getting going, start documenting your processes, because then you can start getting help, because all of us are so overwhelmed right now, right? It's a year, I'm recording this mid March. It has been a year since the beginning of lockdown around here. And it's been a long year. It's fed a lot. And we're all overwhelmed. And we're working too much probably, because there's this never ending run on sentence of work and life and everything just keeps going. I want to remind you all not to panic. That's what we started with here. was not panicking. Everyone was overwhelmed and freaking out. And I am trying to help you get your processes streamlined so that you are not so overwhelmed that you have help. And there is a lead at the end of the tunnel even when the rest of the world is still crazy a year later. So go check out the SOP template and get started and if you need help, let us know go check out Reynoldsobm.com slash Get your act together. And let's let's get it together people get together. All right, I'll see you next week.

Thanks for joining me this week on the Sink Handle podcast. I can't wait to do all of this again next week. Make sure to visit us at reynoldsobm.com for the show notes on anything we talked about today. If you love or you mostly like the show, please subscribe and rate us on iTunes so we can help more people avoid the Sink Handle.