Operations Manual Development Workbook

Empowering You to Build a Clear & Effective Operations Manual

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Introduction

An operations manual is your go-to guide for running your business smoothly and consistently. It documents processes, policies, and standards to help your team deliver quality work and maintain efficiency. Use this workbook to outline the essential parts of your manual and build it step-by-step.

Section 1 – Business Overview

- What is your business name?

  _____

- Describe your business mission and vision:

  _____

- What products or services do you offer?

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- Who are your key customers or target market?

  _____

Section 2 – Organizational Structure

- List your key roles and responsibilities (owner, managers, staff):

  _____

- Include an organizational chart (draw separately if needed):

  _____

- What are the reporting lines and communication flow?

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Section 3 – Policies & Procedures

- What are your core business policies (e.g., attendance, dress code, customer service)?

  _____

- Describe key procedures for daily operations (e.g., opening/closing, order processing):

  _____

- How do you handle customer complaints or returns?

  _____

- What safety or compliance rules apply to your business?

  _____

Section 4 – Product or Service Delivery

- Outline the step-by-step process to deliver your main product/service:

  _____

- What quality standards must be met?

  _____

- What equipment, tools, or technology are needed?

  _____

- How do you train employees on this process?

  _____

Section 5 – Administrative Procedures

- How do you manage appointments, orders, or bookings?

  _____

- Describe your invoicing, billing, and payment collection process:

  _____

- What record-keeping systems do you use?

  _____

- How is inventory managed?

  _____

Section 6 – Communication & Reporting

- How do team members communicate internally? (meetings, email, software)

  _____

- What regular reports or metrics are tracked?

  _____

- Who receives these reports and how often?

  _____

Section 7 – Training & Development

- Describe your onboarding process for new employees:

  _____

- How is ongoing training conducted?

  _____

- Are there any certifications or licenses required?

Section 8 – Emergency & Contingency Plans

- What are the key risks your business faces?

- Outline your plan for emergencies (fire, power outage, data breach):

- Who is responsible for crisis communication?

Section 9 – Review & Updates

- How often will the manual be reviewed and updated?

- Who is responsible for maintaining the manual?

Final Tips:

- Use clear, simple language and keep instructions precise.
- Include visuals (charts, photos, screenshots) where helpful.
- Make the manual easily accessible to all employees.
- Continuously update as your business grows and changes.