

FOUR KEY

BUSINESS FUNCTIONS

AND RELATED PROCESSES

OPERATIONS

- Product/service delivery
- Quality control
- Inventory management
- Vendor and supply chain management
- Workflow and scheduling
- Equipment and facilities management
- Standard operating procedures (SOPs)
- Customer service and support
- Compliance and risk management

MARKETING & SALES

- Branding and messaging
- Lead generation (ads, content, social media)
- Sales funnel creation
- Email marketing campaigns
- SEO and website optimization
- Customer relationship management (CRM)
- Pricing strategies
- Promotions and offers
- Market research and competitor analysis
- Sales calls and closing processes

FINANCE

- Bookkeeping and transaction recording
- Invoicing and accounts receivable
- Budgeting and forecasting
- Cash flow management
- Profit & loss monitoring
- Tax planning and filing
- Payroll and contractor payments
- Financial reporting
- Expense management
- Business banking and reconciliation

ADMIN/HR

- Hiring, onboarding, and offboarding
- Staff scheduling and time tracking
- Employee reviews and training
- Policies and procedures documentation
- Legal and HR compliance
- Insurance and benefits management
- Recordkeeping and document management
- Office management
- Technology and software systems
- Business planning and goal tracking



BUSINESS PROCESSES

TO FOCUS ON FIRST

1. Client Onboarding Process
 - How you welcome new clients and collect key info (contracts, payments, timelines, etc.)
 - Builds trust and sets expectations
2. Sales & Lead Follow-up Process
 - A clear, repeatable system for following up with leads, sending proposals, and closing sales
 - Prevents missed opportunities
3. Bookkeeping & Financial Tracking
 - Process for recording income, expenses, and reconciling accounts
 - Enables tax readiness and better decision-making
4. Invoicing & Payment Collection
 - System for issuing timely invoices, sending reminders, and collecting payments
 - Supports steady cash flow
5. Time Management & Task Planning
 - Weekly/daily planning process to prioritize and organize tasks
 - Helps avoid burnout and stay focused on business growth
6. Marketing Content Planning
 - Plan for what, when, and where you'll post content (social media, email, blogs)
 - Ensures visibility and consistent branding
7. Standard Operating Procedures (SOPs)
 - Documented instructions for repetitive tasks (how-tos for admin, customer service, etc.)
 - Prepares your business for delegation
8. Customer Service Workflow
 - Process for responding to client questions, complaints, and support requests
 - Keeps customers happy and loyal
9. Tax Prep & Estimated Tax Process
 - System to track and set aside taxes quarterly
 - Avoids surprises and penalties
10. File & Document Organization
 - Digital or physical system for organizing contracts, receipts, client info, etc.
 - Saves time and reduces stress



HOW TO START DOCUMENTING

(WITHOUT OVERWHELM)

1. Start with What You Do Most Often or the top 10 previously listed

- Pick 1-3 repeatable tasks you do regularly (e.g., onboarding a client, posting to social media, sending invoices).
- Focus on what's already in your head – don't start from scratch with something unfamiliar.

2. Record Yourself Doing the Task

- Open Loom (or your phone camera) and screen record or video yourself walking through the process.
- Talk through each step as if you're training someone new.
- This creates a "first draft" without having to write anything yet.

3. Turn the Video into a Simple Checklist

- Watch your recording and write down the steps in a checklist format.
- Use bullet points – it doesn't need to be fancy or detailed at first.

Example:

How to Send an Invoice:

- Log into accounting software
 - Select client from list
 - Enter service details and date
 - Review total and due date
 - Send and save PDF copy
- The video itself is a great tool for delegating the process to someone else later.

4. Use a Template or Repeatable Format

- Use a simple SOP Template for consistency (see page 5)
- Each SOP can include:
 - Task Name
 - Purpose
 - Frequency
 - Step-by-step checklist
 - Tools used
 - Last updated

5. Document as You Delegate

- Every time you hand off a task (to a VA, assistant, etc.), take that opportunity to document it.
- Ask them to help improve the documentation over time.



HOW TO START DOCUMENTING

(WITHOUT OVERWHELM)

6. Create a Central Place to Store SOPs

- Use a Google Drive folder, Notion page, or SOP binder.
- Organize by function: Marketing, Admin, Finance, etc.

7. Don't Try to Do It All at Once

- Set a goal: One process per week.
- Over time, you'll build a full Operations Manual—without the burnout.

Bonus Tip:

"Done is better than perfect." Your first draft can be messy—it's more important to start than to wait for the "perfect" version.

Also, look to see if there are any industry-specific apps/software for building out and organizing SOP's. If not, look into the following options:

- Trello
- Trainual
- Scribe



SOP TEMPLATE

CUT AND PASTE INTO WORD AND SAVE TO BE USED AS YOU GROW
YOUR SOP'S

SOP Title:

[Name of the task or process]

Department/Function:

[Marketing, Operations, Finance, Admin, etc.]

Created By:

[Name or role]

Date Created:

[MM/DD/YYYY]

Last Updated:

[MM/DD/YYYY]

Purpose:

[Explain why this process exists. What is the goal or outcome?]

Example: "To ensure invoices are sent accurately and on time."

Frequency:

[How often is this done? Daily, weekly, monthly, as needed, etc.]

Tools Needed:

[Software, forms, logins, templates, etc.]

Responsible Person/Role:

[Who is responsible for completing this task?]

Step-by-Step Instructions:

1. [Step 1]
2. [Step 2]
3. [Step 3]
4. [Step 4]
5. ...continue as needed...

Tips/Notes:

[Any shortcuts, watch-outs, reminders, or helpful links]

Attachments or Linked Resources:

[Links to templates, video walk-throughs, examples, etc.]

