

→ A PRACTICAL GUIDE

TURNING YOUR CORE PROCESSES INTO SIMPLE GUIDES

Capture how your business runs, so new starters settle in faster and work carries on when someone is away.

For business owners and teams



Why



What



Who



How

→ A NOTE FROM KERI

The way you work, made clear

The know-how that keeps your business running is one of its most valuable assets. Yet in most small businesses, none of it is recorded anywhere.

It lives in your head, or in the head of the one person who “just knows”. That’s fine until someone new joins, someone goes on holiday, or someone moves on. Lumo is a small business working with small businesses, and I know how hard it is to find the time to capture all of this. So this guide isn’t a step-by-step manual. It’s the thinking to do first, so whatever you document actually gets used.

Keri, Founder, Lumo

01

Faster onboarding

New joiners get up to speed without shadowing you for weeks.

02

Calmer handovers

Holidays, sickness and leavers don’t bring work to a stop.

03

Your time back

Fewer repeat questions, and more time to work on the business.

Four questions to start with

- 1 Why are you doing it?** The problem you’re really solving.
- 2 Which processes?** Five tests to find the ones that matter.
- 3 Who is it for?** Writing for the people who will use it.
- 4 What format?** From a simple checklist to AI-supported guides.

What is a process guide? Sometimes called a standard operating procedure (SOP), it’s simply a shared, documented version of the way things work in your business. It can be as simple as a one-page checklist or an AI assistant your team can ask. What matters is that it gets used.

→ 01 · BEFORE YOU WRITE ANYTHING

Start with **why**

Be clear on the problem you're solving first: it shapes what you document, how much detail you need and which format will work.

- ? What's prompting this now: a new hire, someone leaving, growth or a mistake?
- ? Where do things slow down or go wrong when a key person isn't around?
- ? Which questions do you or your team answer over and over again?
- ? If you were off for two weeks from tomorrow, what would stop or wobble?

**One well-used guide
beats twenty in a
folder.**

Picture what "good" looks like six months from now: faster onboarding, fewer errors, more of your time back. If you can't name a clear reason yet, start smaller.

→ 02 · WHAT TO DOCUMENT

Choose your **core processes**

You don't need to document everything. List your regular tasks, then run each one through five quick tests.

How often, how complex?	Frequent tasks repay the effort quickly. Occasional, complex ones, like year-end, are the easiest to forget.
What if it's done wrong?	Anything that impacts money, clients, compliance or data comes first.
Does only one person know it?	If they're on leave or move on, the work stops with them. That's your biggest handover risk.
Needed in month one?	Document these first, and onboarding almost runs itself.
Is it stable?	Processes that change every week aren't ready yet. Fix the process first, then document it.

Common starting points

Invoicing and payments

Client queries and complaints

Onboarding new clients

Month-end tasks

Purchase orders and supplier management

Payroll preparation

→ 03 · WHO IT'S FOR

Write for **the reader**, not for you

A brand-new hire needs more context than a colleague covering for a week. Picture the person using it:

New or covering? New to the business, new to the role, or stepping in temporarily.

What do they know? Your tools, your customers, your industry.

Learning or doing? Training needs the why. Doing the task needs a quick list to follow.

Working remotely? They can't lean over and ask, so the guide must stand on its own.

Who do they ask? Make the go-to person clear when they're stuck.

The test: could someone follow it with the odd question, rather than you talking them through it?

→ 04 · THE RIGHT FORMAT

From simple **to AI-supported**

The best format is the one your team will actually use. Start simple and level up later; most businesses end up with a mix.

FORMAT	BEST FOR	EFFORT
Simple checklist	Repeatable tasks with clear steps	Low
Written document	Most core processes; easy to share and update	Low
Short screen recording	Showing a task while talking it through; add a written summary so it's searchable	Low
Flowchart	Processes with decisions and hand-offs	Medium
Shared knowledge base	One searchable home for all your guides as you grow; needs an owner	Medium
AI-supported guides	Lots of processes, or new joiners who need answers on the spot	High

How AI **can help**

CREATING

Turns a recording or rough notes into a first draft.

USING

Answers team questions straight from your guides.

UPDATING

Flags gaps and prompts reviews when things change.

AI builds on clear guides; it doesn't replace them. Always have a person check it, and protect client data.

→ 05 · MAKING IT STICK

What good looks like

Whatever format you choose, the guides that actually get used tend to share six traits.

01**Short and focused**

One process per guide, not a manual.

02**Plain language**

Written the way you'd explain it to a colleague.

03**Clear purpose**

Why it matters, and what "done" looks like.

04**Easy to find**

One agreed place, with names people would search for.

05**Owned**

A named person keeps each one right.

06**Tested**

Someone other than the author has followed it.

Keeping them alive

An out-of-date guide can do more harm than none at all. Agree a simple rhythm:

- 1 Review** your core guides every 6–12 months.
- 2 Update** whenever a process or tool changes.
- 3 Ask new joiners** to flag anything unclear.

→ NEED A HAND?

Let Lumo document it for you

Knowing what to document is one thing; finding the time to do it properly is another. We help small businesses turn their core processes into clear, practical guides, ready for onboarding and smooth handovers.

CAPTURE

The processes that matter most

CREATE

Clear guides in the right format

CONNECT

From checklists to AI support

