

The Lazy Solopreneur's Guide to SOPs

*Simple systems
without the stress.*

A Small Business Guide



Let's Start With The Basics

“SOP” stands for Standard Operating Procedure

This guide is for the first-stage solopreneur—the one doing it all solo, with no staff (yet). 🧑💻

You're building your business, figuring things out, and trying not to drown in to-dos.

That's where this guide comes in.

- ✓ It's quick.
- ✓ It's practical.
- ✓ It meets you exactly where you are.

Let's make it simple, fast, and dare I say... even kinda fun?



SOP CATEGORIES TO GET YOU STARTED

You don't need a system for everything. Start with what you're doing most often. Here are some great starter categories:

1. Client Experience

- Discovery call process
- Client onboarding
- Offboarding checklist
- Welcome email template

2. Marketing & Content

- Blog publishing workflow
- Weekly newsletter
- Social media post creation & scheduling



SOP CATEGORIES TO GET YOU STARTED

3. Admin & Operations

- Invoicing & payment reminders
- File management
- Weekly CEO check-in process

4. Tech & Tools

- Setting up a new calendar booking link
- Updating website content
- Creating a form or automation

Pick one from any category and start there!

Pro Tip: Choose the task that's causing the most chaos—that's your first win.



Step 1: Start With Just ONE Task



Pick one repeatable task you do regularly.

Example:

- Client onboarding
- Weekly newsletter
- Posting to Instagram

Quick-win approach:

- Open a Google Doc
- Title it: "How I Do X"
- Write down each step in bullet points (keep it messy!)

You can also just hit record on Loom or your phone's voice memo app.

Done is better than perfect!



Step 2: Keep It High-Level



Don't overthink it.

This isn't a legal document—it's for you. (and maybe your future Virtual Assistant).

Ask yourself:

- What are the steps I always take?
- What could go wrong if I skipped something?
- What would I want someone else to know if I ever handed off this task?



Step 3: Use Your Favorite Tools



Use whatever tools feel natural.

No need to learn something new just for this.

Try:

- Google Docs
(simple and searchable)
- Notion (great for organizing)
- Trello or ClickUp
(for checklist-style SOPs)

Add links, screenshots, or templates if you have them.

Or don't. You're in charge!



Step 4: Rinse and Repeat



Once you finish one, choose another task next week.

You're building your Mini Operating Manual one step at a time.

Keep them short.

Keep them usable.

Keep them yours.



Bonus Tips From an OBM

(That's Me!) 🙋

- ✓ You don't need to document everything
- ✓ Focus on what's repeatable and draining your mental energy
- ✓ Voice notes and messy docs count
- ✓ Done > perfect

Hate writing? Try this:

- Speak your process into your phone's voice notes app 🎙️
- Use Otter.ai, Google Docs voice typing, or your favorite transcription tool to turn it into text
- Paste it into ChatGPT and ask it to clean it up into steps!

You are allowed to make this easy.

If the thought of organizing this makes you want to hide under a blanket, I can help.

Let's build your Mini Operating Manual together—without the stress 🙋



Now that you've got a solid start, here's what it looks like when you grow...



As your business becomes **more established**—and you're ready to bring on a Virtual Assistant (VA), Online Business Manager (OBM), or contractor—**your documentation needs will shift.**

That's where things like:

- Role-specific SOPs
- Delegation plans
- Collaborative tools ...come into play.

But guess what? This Lazy Guide lays the foundation for all of that.

**Future You (and your future team)
will thank you.**



You Don't Have to Do This Alone

Book a Discovery Call and
I'll show you how simple
systems can feel like a
breath of fresh air.

You've got this.

And I've got your back.



Contact Information

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