

# S.O.P. CHECKLIST for Business Owners

Why Leveraging Systems Will Save  
Entrepreneurs Time, Energy & Money

“If you don’t explain the task and give the job to someone else, it’ll be yours.” — Chris Niemeyer

## CLIENTS

- Qualifying & Acquiring**
- Onboarding**
- Termination**
- \_\_\_\_\_

## FINANCIAL

- Billing & Invoicing**
- Payroll**
- KPI Reports**
- \_\_\_\_\_

## OPERATIONS

- Help Desk Manual**
- Product Launch Plan**
- Policies & Procedures**
- \_\_\_\_\_

## TEAM

- Hiring & Onboarding**
- Training**
- Performance Reviews**
- \_\_\_\_\_

## SERVICES

- Marketing Guidelines**
- Social Media**

## YOUR BUSINESS

- \_\_\_\_\_
- \_\_\_\_\_

Check off the areas where you have a clear System & Process in place. Where do you need to create an SOP? What areas do you need to add to make your business thrive?

# How To Build Your Standard Operating Procedures

*Creating documented procedures* is the fundamental way to scale your business and ensure all important activities are done *efficiently* - the way you want.

Business owners routinely identify they are the "*bottleneck*" to their own growth. As entrepreneurs, we make the majority of the decisions and have been doing the majority of the tasks from day one.

**"Any business operation that needs to be done more than twice needs to be documented."** -Chris Niemeyer

## *Step 1. Identify How You Will Present the SOP*

ISO-9000 Compliant- if large company and international standards are required

Simple Checklist- a great start for solopreneurs and small teams; rapid, add details later

Sequential Linear Checklist- record as much detail as possible; sub-lists, variables

Process Flow Diagram- a visual SOP explains coherent whole

## *Step 2. Gather Stakeholders*

Have employees or contractors performing these duties? Collaborate together!

Teamwork brings more expertise, scrutiny and ownership into building the process.

## *Step 3. Determine the Purpose*

New business opportunities need new procedures? Existing tasks and systems causing pain points? Identify the purpose with the end in mind. What will this SOP make possible when it's completed?

## *Step 4. Detail Instructions*

Use action command verbs. Ensure all explanations, resources, links, scripts, templates & processes are included. Use plain, straight-forward language. When appropriate, include screenshots, video tutorials, etc. Is it clear enough that someone from outside your company could follow this procedure?

## *Step 5. Create Metrics or Checklist for Measurable Results*

Goal-based scenarios are more likely to succeed. Instead of "share this article online" your measurable objective may be "post this article to 15 online social media groups or sites". Goals matter and can objectively define a processes success.

# Standard Operating Procedure Template

The following SOP Template can be your guide to begin several basic SOPs for your ongoing business activities.

**"Ongoing business activities documented into SOPs provide entrepreneurs the FREEDOM they desire. Scale up, work in your sweet spot and enjoy more time with those you love." -Chris Niemeyer**

**Purpose:** Define the purpose - the why - behind this particular SOP for your company.

**When:** What triggers this SOP to begin and end?

**Where:** How and where will this SOP be accessed?

**Who:** Which key personnel are involved in this SOP activity?

**Process:** This is where the actual procedure is written out in specific detail.

- If an activity is best displayed in hierarchy, utilize bullet points
  - and indentations as necessary
    - to define the process.
- 1. If it's performed sequentially
  - a. Use numbered lists
    - i. Like this.
    - ii. Be sure to include relevant links, resources, screenshots, videos within the process.

**Measure:** Which metrics, goals or checklists will you put in place to define success?



GROW  
YOUR  
BUSINESS

## Meet Your Guide - Chris Niemeyer

Ever feel overwhelmed trying to run your business? Like maybe you're the bottleneck to growth? Chris helps busy entrepreneurs discover more time to work in their sweet spot, spend time with loved ones and travel more. He helps them **create systems** in their business, **delegate effectively** & leverage **productivity tools** in order to multiple their time. Living a life of adventure, spending more time with loved ones and operating in your sweet spot can be a reality. **Work smarter, not harder.**

If Chris Niemeyer isn't traveling the world with his wife and 4 young kids or running his businesses from his phone, he's committed to helping other entrepreneurs work ON their business instead of IN it.

He owns multiple businesses, is a podcaster, coach and business consultant. His **FREEDOM System Bootcamp** begins fall 2019.

He's passionate about helping business owners discover more time and financial freedom. Chris teaches you how to delegate effectively; leverage productivity tools & build systems so your business can thrive as you work in your sweet spot.

Chris loves to travel, visited 40+ countries with another 100 on his bucket list. For some strange reason, Chris' interests start with the letter "f" – faith, family, friends, food, fitness, finance & far-off places. Outside of work, he's likely being tackled by and playing with his 4 young kids, coaching their sports activities & enjoying family time with his wife, Alicia.

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