

Standard Operating Procedures

EAGL presentation
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SOP Overview

Welcome and Introduction

System vs process

Why the need to document a process.

How to develop a process.

SOP Template sample

Examples

Systems and Processes

Systems
are simply
defined as
“What
you do.”

The methodical way you provide
goods and services.



Processes
are
defined as
“How you
do it.”

All of the activities that allow the
system to function.

Why are SOPs important in an organization?

A clear understanding of why SOP's are crucial to an organization's optimization of people and resources is essential and the concept needs total buy in from ownership before any integration efforts are made in an existing culture.

The following reasons are important to understand:

1. To have a defined methodology that encourages best practices.

The ultimate goal is to gain consistency and maximize resources to achieve the highest quality results from a process.

2. To clearly define the end goal.

Everyone has to share the same vision of what the finish line really looks like. People need to be clear on the desired end result to stay on track.



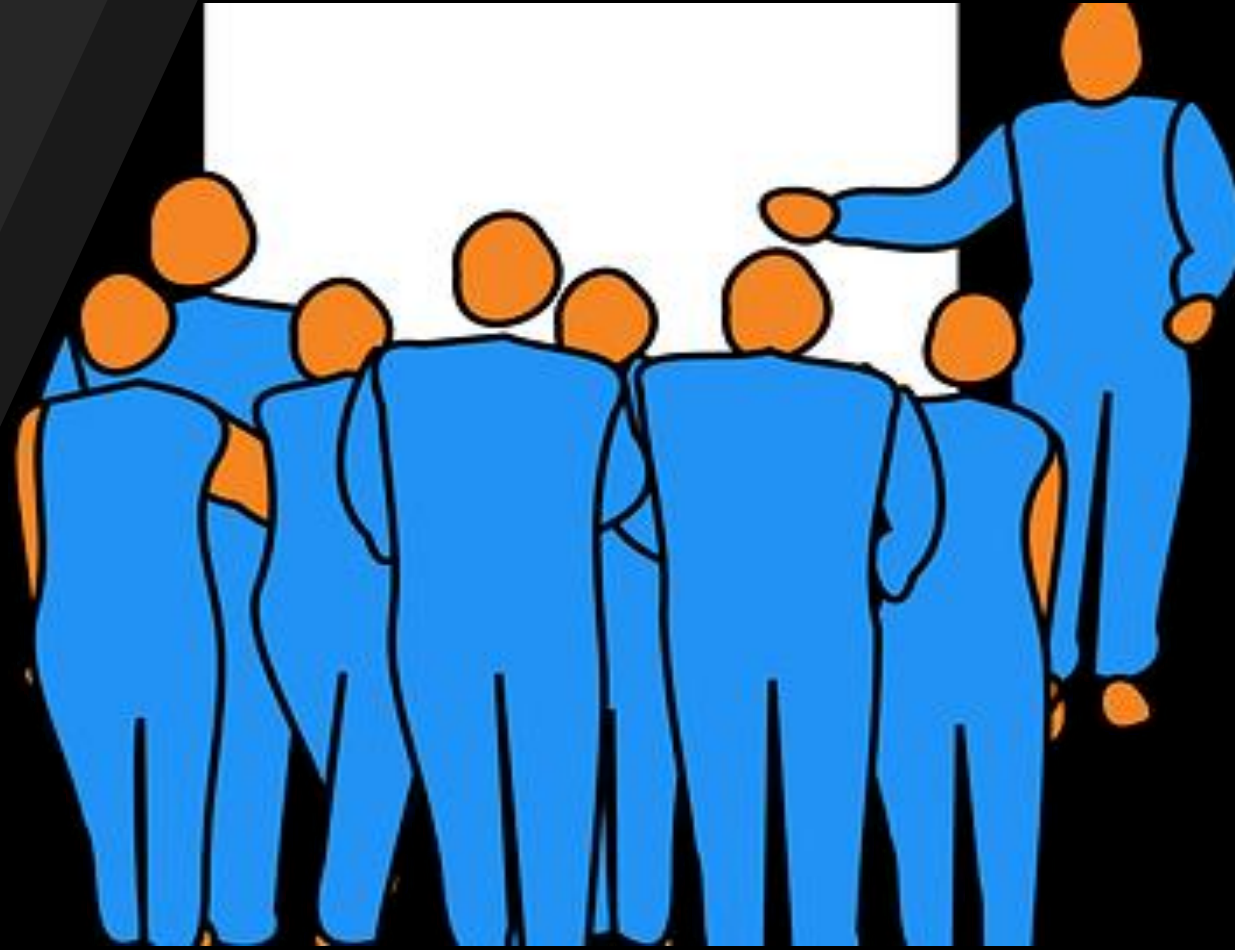
3. To get all team members on the same page

Documentation is crucial. Until the process is documented, there are as many perceived processes as there are involved staff members.



4. To train new team members

Change in staff is a certainty. Getting them to assimilate quickly is essential.



5. To allow for strategic review rather than emotional, knee-jerk reactions.

A planned review program built into the process allows for continual improvement and helps to avoid crisis stimulated changes.



6. To promote a review that enables all team members to focus on and discuss actual process steps rather than feelings.

An organized review process allows all participants to look at the process details together and avoids pointing fingers or drifting into unconnected issues. Everyone can look at the same details together.



7. To focus on what it takes functionally to succeed rather than on the people involved.

- Having a documented SOP allows everyone to understand that success is determined by the process details. People generally want to succeed and will follow a process that is clear and helps to achieve success.
- If a person is a problem in an organization, it can be easily identified and documented that they aren't following a process. Then corrective behavioral steps can be taken and monitored.

8. To tie in clear metrics that allow staff to measure their successes and make changes based on achieving metric goals.

This is one of the most important reasons. Shared metrics with the team allows for all members to monitor success and make adjustments that contribute to achieving goals.

This is an crucial tool to help managers/owners stay on track with staff feedback and celebrations.



Next: How to develop and document a process

- First, you must gain complete buy-in from ownership.
- A commitment to the concept must be unwavering and sincere. This must be viewed as how you will run the organization in the future and not just another fad from some seminar.

1. Select a process that needs documenting

Start with something simple. Usually something staff will agree on.

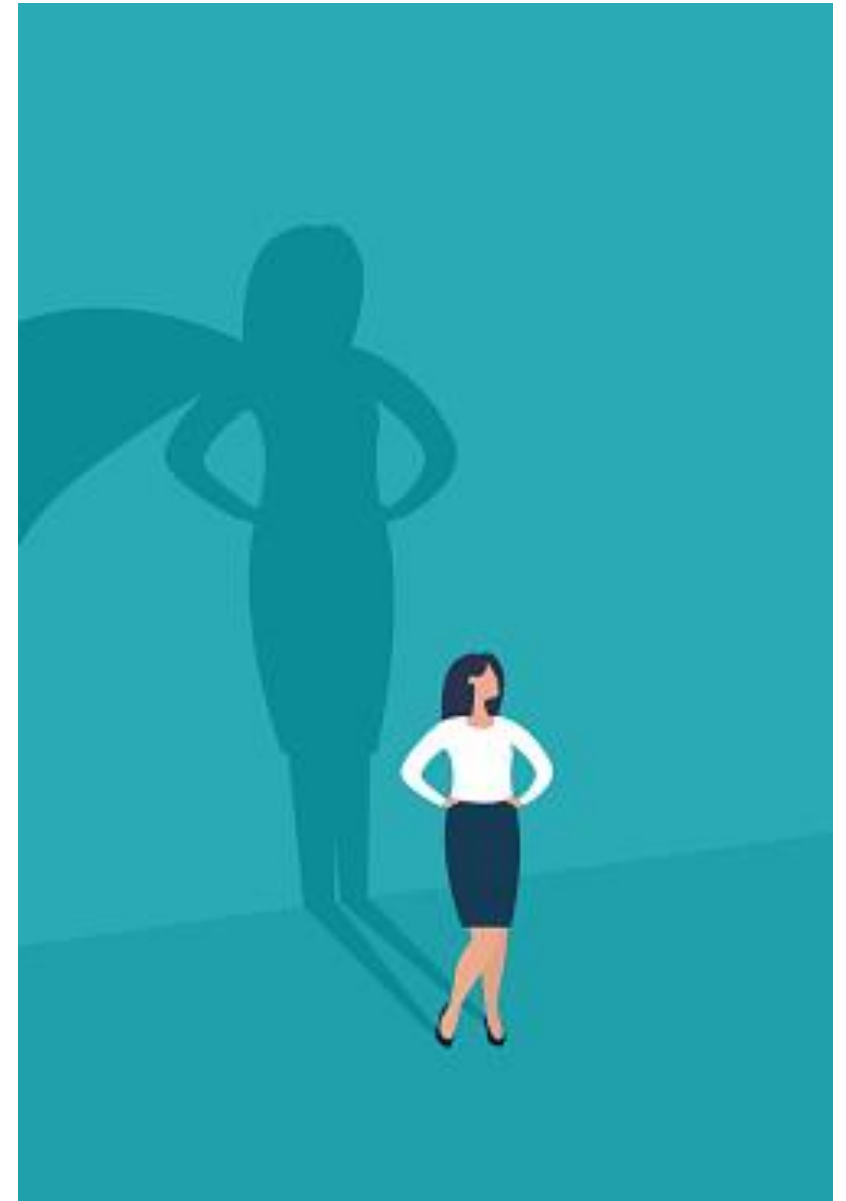
Ask which process should be documented and why?

Keep it simple with appropriate details.

Do not skip steps or assume people should “just know.”

2. Select a champion who will claim ownership.

- Select a person that has organizational skills and writing skills to document.
- She does not have to be the lead manager.



3. Use a universal template within the organization for all processes.



Consistent formatting helps staff to include all the important sections.



A consistent format allows for quicker understanding when training staff.



I will supply a sample.

4. Avoid using another organizations' logo or process name.

- Make it your own to promote buy in by all staff.
- This needs to become your culture and not someone else's.
- Changes in culture can be difficult. Don't create potentially unnecessary objections.



COMPANY NAME
YOUR SLOGAN GOES HERE

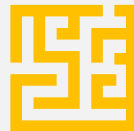
5. Clearly define the process function with a descriptive title.



Gain agreement on the accuracy of the title.



Don't underestimate the importance of this.



Don't combine concepts.

6. Include staff members from every involved sector of the organization.

- Always include and enlist opinions from the “quiet one.”
- Listen.
- Resist being dominant.
- This not about what is right or wrong. It is about what is.



7. First, document what is currently happening.

- There needs to be agreement on what is actually happening.
- This usually brings disagreement to the forefront.
- Don't be surprised to hear that there are widely varying viewpoints. That is why this is needed.



8. Agree on metrics that will add value and then set goals.

- This is crucial. Without valuable metrics, we create a guessing game on what success looks like based on feelings.
- All metrics should have meaning and be data driven.
- Having goals allows all staff to share the end vision and make decisions that help reach them.



9. Have documentation centrally available.

- Permission on editing is given to the champion only.
- Changes can only be made with agreement by the team.



10. Set up process review period(s.)

1

Develop immediate changes. Gain agreement on adjustments based on current discussions while you are documenting what is currently happening.

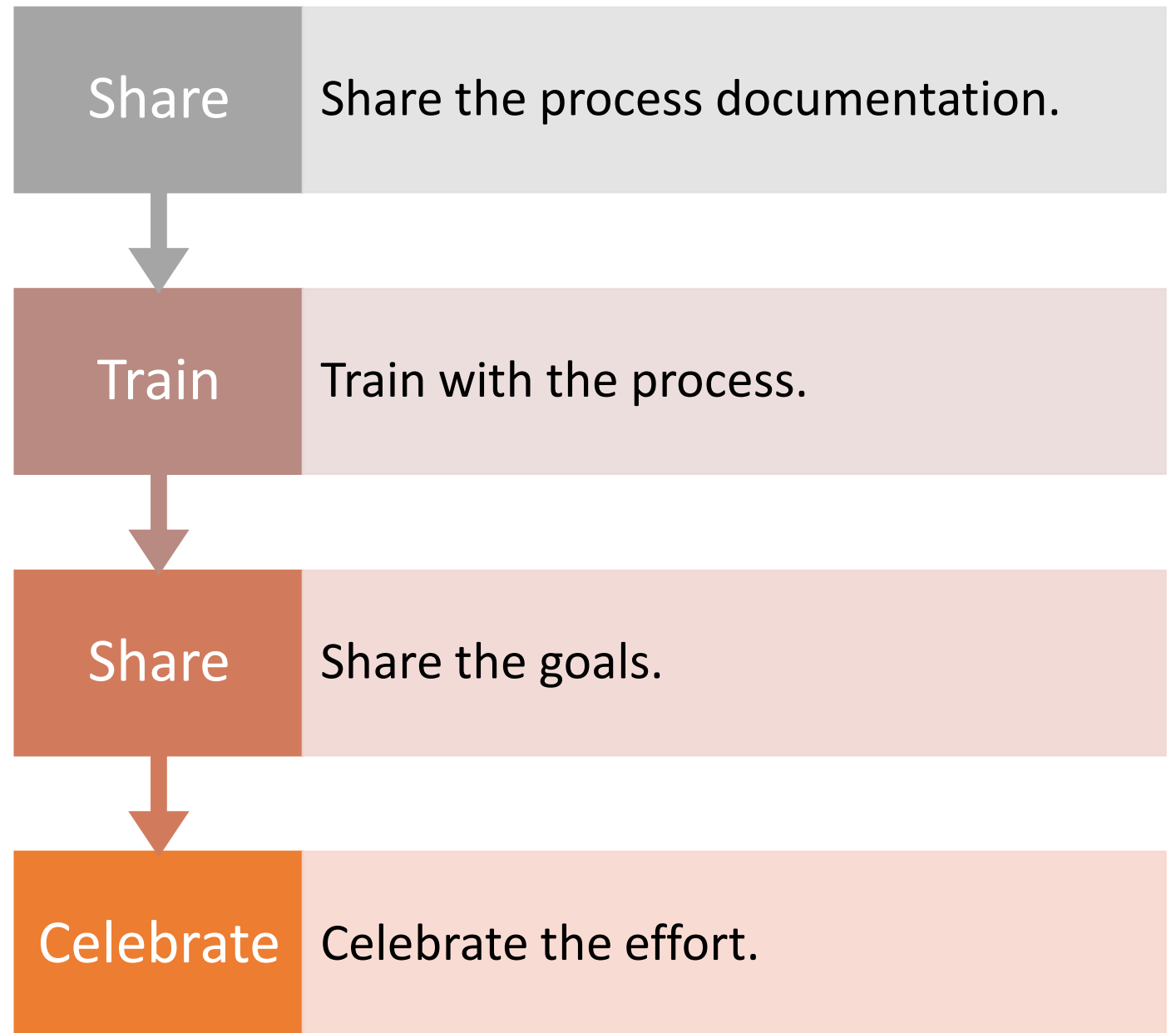
2

Create defined periodic reviews. (Do not wait for a crisis driven event to review the process.)

3

Review periods can be yearly, monthly, seasonally or just when a process is completed. The important thing is to schedule them.

11. Communicate the process with the organization



12. Conduct a scheduled review of the process with key members.



Examples



Sample template



Simple Sample
process

Documentation
Flow chart

Company Logo

Updated: _____

Process Title:

Process Objective:

Timetables:

Process time range:

Process Deadline:

Process oversight responsibility:

Steps:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Metrics/Key Results:

1. Measurement:

Goals:

2. Measurement:

Goals:

Review Plan/Correction of errors:

1. Short range:
 - a. Initial changes
 - b. First year review
2. Periodic schedule:
 - a. Yearly, Monthly, Seasonally

Process Title: Making Breakfast before work

Process Objective: To have a nutritional breakfast in an organized manner on workdays.

Timetables:

Process time range: 20 minutes
Process Deadline: 6:20 AM

Process oversight responsibility: Yourself

Steps:

1. Day prior, develop menu and verify inventory.
2. Day prior, prepare coffee maker and set timer for 5:30 AM.
3. Day prior, set alarm to allow for time to wake up, shower and dress prior to 6:00 AM.
4. Shower, dress and enter the kitchen.
5. Pour coffee into cup and begin stimulus.
6. Slice 6 strawberries into quarters with a paring knife.
7. Pour 1 cup of Cheerios into a bowl.
8. Sprinkle strawberries on top of Cheerios.
9. Pour ½ cup of milk over the Cheerios.
10. Eat Cheerios, strawberries and milk using a teaspoon.
11. When finished, place bowl, spoon, paring knife and coffee cup into the dishwasher.
12. Leave a clean cup next to the coffeemaker with a love note for your spouse.
13. Fill traveler cup with coffee for the ride to work.
14. Brush teeth and start your commute with your traveler.

Metrics/Key Results:

1. Measurement: How many days per week a breakfast was eaten?
Goals: Eat a nourishing breakfast every workday.
2. Measurement: How many days per week did you leave by 6:30?
Goals: Leave home by 6:30 every workday.

Review Plan/Correction of errors:

1. Short range:
 - a. Initial changes after one week.
2. Periodic schedule:
 - a. Seasonally review the process and timetable for nutritional and timing adjustments

Use photos and videos to communicate steps effectively.

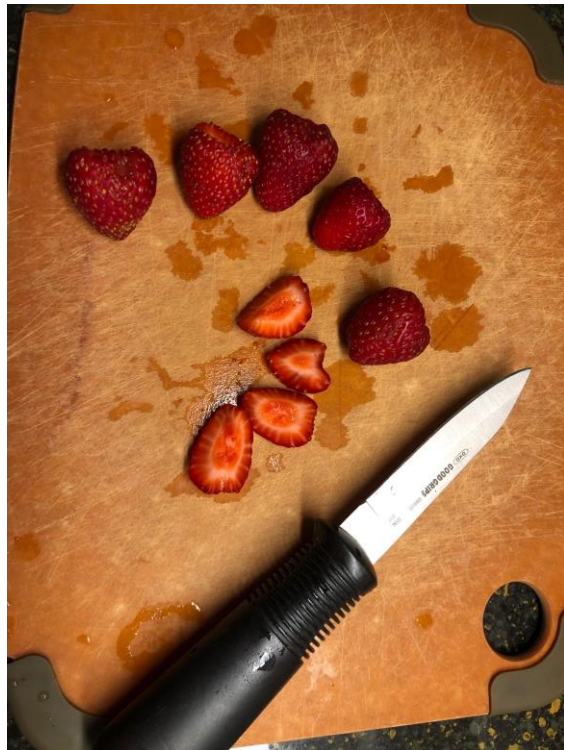
Communicate tools, activities, standards and desired results.

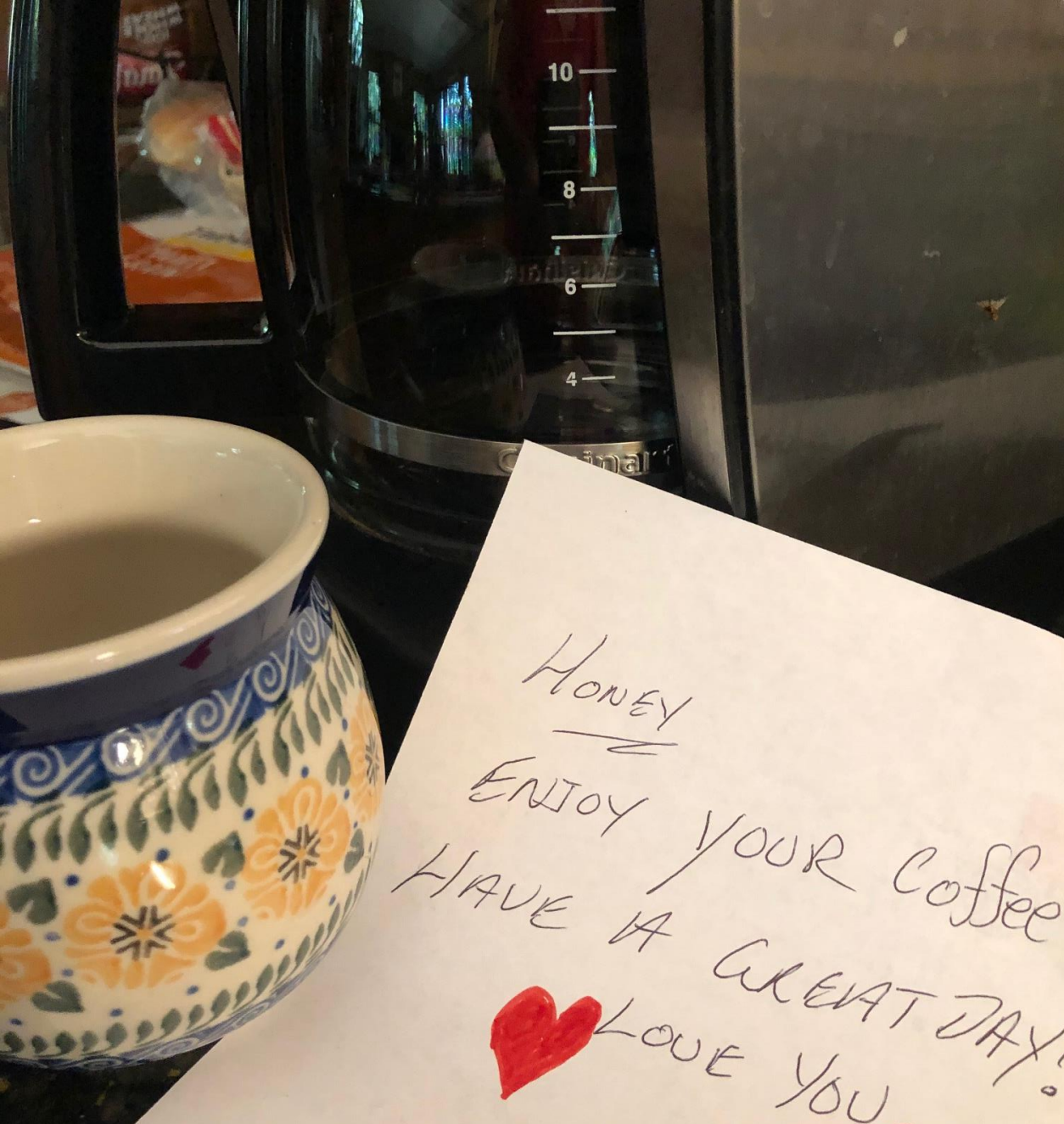




1. Day prior, develop menu and verify inventory.
2. Day prior, prepare coffee maker and set timer for 5:30 AM.
3. Day prior, set alarm to allow for time to wake up, shower and dress prior to 6:00 AM.
4. Shower, dress and enter the kitchen.

5. Pour coffee into cup and begin stimulus.
6. Slice 6 strawberries into quarters with a paring knife.
7. Pour 1 cup of Cheerios into a bowl.
8. Sprinkle strawberries on top of Cheerios.
9. Pour $\frac{1}{2}$ cup of milk over the Cheerios.





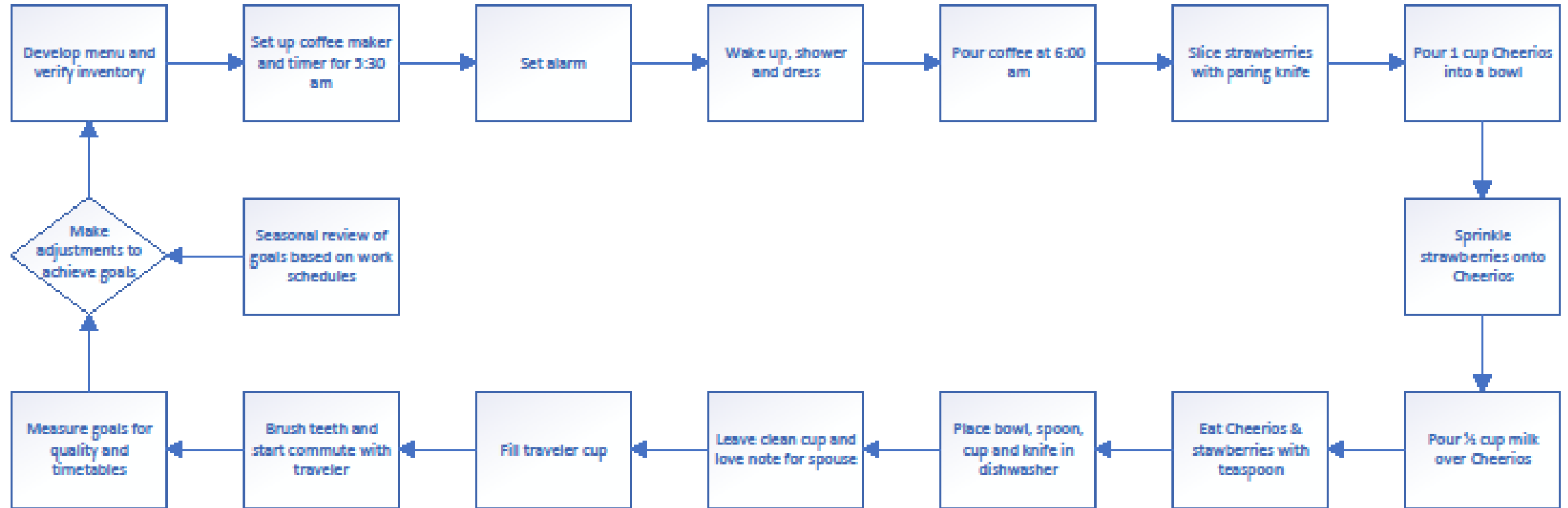
10. When finished, place bowl, spoon, paring knife and coffee cup into the dishwasher.

11. Leave a clean cup next to the coffeemaker with a love note for your spouse.

13. Fill traveler cup with coffee for the ride to work.
14. Brush teeth and start your commute with your traveler.



Making Breakfast





Make it Fun

- Don't be afraid of Humor.
- Use yourself as a target-not others.
- Good humor is about silliness and not people's faults.
- Laughing is good for you.

Questions

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Strategy
Alignment
Growth

