

Blueprint Your Business by Creating an Operations Manual

By Lisa Montanaro

Can Your Business Run Without You?

What would happen to your business if you became ill for an extended period of time? Could someone else man the shop for you easily? Would you be more relaxed on vacation (or at the very least, take a vacation!) if you knew that the business could be better taken care of while you are away? Have you ever thought about hiring an employee or assistant, but are overwhelmed with the thought of training someone in all of your business systems and processes? Are you holding onto too many tasks that you know you could be delegating, but don't have the infrastructure in place to effectively delegate without taking up too much of your precious time as the business owner? If you answered yes to any of the above questions, you are in need of a business blueprint! It's time to create an Operations Manual.

What is an Operations Manual and Why Do I Need One For My Business?

Before you started your business and in the early stages, you probably did a lot of planning. Most likely, you were told to draft a business plan, and you may have even done so. Unfortunately, most small business owners rarely look at their business plan after creating it, thereby rendering it meaningless on a daily basis. A business plan is a static document, as opposed to a living and breathing one that serves as a guide to your business systems and processes. Developing systems and taking the extra step to document them is vital to a business running smoothly and automatically.



Unfortunately, most businesses are lacking in this area. Business owners get caught up in the daily activities of running the business, and do not take the time to document or blueprint the systems in place. In the E-Myth Revisited, author Michael Gerber sets forth the idea that all businesses need to be "franchised" in the sense that they can run automatically, deliver a consistent experience to customers, and can be maintained, at least to some extent, without the owner's hands-on involvement. While you may not literally be franchising your business, Gerber's concept broadly translates into developing an Operations Manual for your business.

What Are the Advantages of an Operations Manual?

An Operations Manual makes it easier to delegate and run your business. However, even if you have no employees, independent contractors, or assistants of any kind, the importance of an Operations Manual should not be overlooked. It provides structure and clarity by helping you examine the big picture and how each part fits into the whole. It is also a handy tool for reminding yourself of your business systems when things get busy and you are overwhelmed. The manual serves as a central location for vital business information, making it easier for you to find what you need in one fell swoop. In a nutshell, an

Operations Manual helps promote a consistent experience for your clients, and helps you avoid reinventing the wheel.



What Format Should an Operations Manual Be Stored In?

An Operations Manual can be hand written if that is your absolute preference, but I would not recommend it. As this document is so vitally important to your business, you should maintain it in electronic format. It is easier to revise, send as an attachment when necessary, and be backed up to avoid loss of data. Some clients prefer to create their Operations Manual using a 3-ring binder approach. While this may be tempting, if that binder is destroyed or lost, there goes all of your hard work in creating an Operations Manual. Do yourself a favor and store the manual on a computer (and back it up!) or online at a secure site.



What Should an Operations Manual Include?

An Operations Manual is the manual of all manuals. It can be as comprehensive as you want and need it to be. It should serve as a blueprint of your business for you, your employees, assistants (virtual or on-site), and anyone else that is on a need-to-know basis. The Operations Manual essentially covers everything that goes on behind-the-scenes of your business. Here are some examples of what an Operations Manual may include, but as you develop one for your business, you will undoubtedly think of many more items to include.

- Passwords to all of your online and offline business accounts (be sure to give some thought to maintaining proper security measures);
- List of frequently used business supplies with purchasing/ordering information;
- List of business documents;
- Prospects intake process;
- Client intake process;
- Sample email templates;
- List of all team members and their contact information;
- Procedures for hiring new team members and training them;
- Preparing for client sessions, proposal pitches, speaking engagements, professional association meetings, etc.
- Client follow-up process.

Take the time to draft an Operations Manual. It will be time well spent, and you will reap the benefits of it long after you finish the blueprint.

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