

Doron F. Eghbali Business Planning Law Blog on Lawyers.com

[Writing an Operations Manual](#)

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Every business needs policies and procedures to run smoothly. Developing and maintaining an operations manual could be an important step to guide your employees to do what you expect them to do. For instance, how would you like your employees to greet customers when they come in the door? What day of the month do you order supplies from a vendor? Or, where do you keep the extra keys to the storage room?

Despite the fact every operations manual is different, there are some guidelines applicable to all operations manual:

1. Organization: Start off with your company's mission statement; the products and services it offers; and any goals and values you would like to communicate to your employees. Provide organizational charts and job descriptions. For instance:

- Write who is in charge of opening the business for the day and how that person should do it. Provide specific instructions such as: park in the back; enter through the side entrance; unlock the door; turn on all the lights; disarm the security system; open all the doors and change the sign to open.
- Write how to answer the phone.
- Write how to greet a customer.
- Write how to handle an angry client.

2. Marketing/Customer Service: Provide specifically:

- Where your business cards, brochures and promotional materials are printed and how often.
- How leads are generated and how they are followed.
- How company handles customer service.

3. People: Provide a detailed description of what every job entails.

4. Technology: Outline all the machines, computers, software and equipment your business uses. Specifically provide:

- How your various pieces of technology operate.
- What they do.
- How employees are trained to use them.
- Who uses them. And,

- How to maintain them.

5. Finance: This is one of the most important areas of your operations manual. It should include:

- How your budget is made and evaluated.
- Cover how to get loans.
- What to do with your profits.
- How to set fees and prices for goods and services.
- How to handle payroll. And,
- How to handle your lease.