

FREE RESOURCE

The SME SOP Starter Kit

Turn one recurring business problem into a simple, repeatable process.

How to Use This Starter Kit

You don't need a 50-page operations manual to start systemising your business. Start with one recurring problem. Choose the task that:

- keeps going wrong
- requires you to step in repeatedly
- causes customer complaints
- creates confusion among staff
- takes up more of your time than it should

Then use the template on the next page to turn what is currently in your head into a process your team can follow.

Your One-Page SOP Template

1. SOP Information

Process Name:

Department / Area:

Person Responsible:

Purpose of This Process (what should it achieve?):

When Should This Process Be Used?

2. The Process

Step 1:

Step 2:

Step 3:

Step 4:

Step 5:

Step 6 (if needed):

What Could Go Wrong?

List the most common mistakes, delays, or problems.

Problem 1:

Problem 2:

Problem 3:

What Should Happen When Something Goes Wrong?

If _____ happens, then _____.

Who should the staff member contact or escalate to?

Quality Check

Before the task is considered complete:

- ☐ The required information has been checked.
- ☐ The required steps have been completed.
- ☐ The customer/stakeholder has been updated where necessary.
- ☐ The transaction/task has been recorded.
- ☐ Any exception has been escalated.

SOP Owner: _____

Date Created: _____

Final check by: _____

Last Updated: _____

SOP Quality Checklist

Before you share your SOP with your team, ask:

Is it clear?

- ☐ Could a new employee understand what to do?
- ☐ Are the steps written in the correct order?
- ☐ Have I avoided unnecessary jargon?

Is it practical?

- ☐ Can the employee actually follow these steps during normal work?
- ☐ Can they find the SOP easily?
- ☐ Is it short enough to use without becoming a burden?

Is it complete?

- ☐ Does it explain when the process starts?
- ☐ Does it explain what needs to happen?
- ☐ Does it identify who is responsible?
- ☐ Does it explain what happens when something goes wrong?
- ☐ Does it identify when escalation is required?

Is it being used?

- ☐ Have I shown the responsible employee how to use it?
- ☐ Have they followed it at least once?
- ☐ Have I observed where they still struggle?
- ☐ Have I updated the SOP based on what I learned?

An SOP sitting in a folder is not a system. It only becomes real once someone follows it.

5 Processes Every SME Should Consider Documenting

You don't have to document everything at once. Start with the processes that have the greatest impact on customers, money, time, and business continuity.

1. Customer / Order Processing

Customer enquiry → Order confirmation → Payment verification → Order preparation → Final check → Dispatch → Customer update → Completion

2. Complaint Handling

Who receives the complaint → How it's recorded → What can be resolved immediately → What requires escalation → Who approves the solution → How the customer is updated → How the complaint is closed

3. Payments and Refunds

Who verifies payment, how payments are recorded, who can approve refunds, what evidence is required, how refunds are communicated, how the transaction is documented.

4. Supplier / Vendor Communication

Who contacts suppliers, what information must be provided, how orders are confirmed, how delays are followed up, who handles disputes, where communication is recorded.

5. Staff Handover

What information must be handed over: outstanding customer issues, pending orders, pending payments, supplier issues, deadlines, and who is responsible for the next action.

Your 15-Minute SOP Challenge

Don't wait for the perfect time. Set a timer for 15 minutes. Choose one recurring problem in your business. Then answer:

- What keeps going wrong?
- What should happen instead?
- What are the steps that should be followed?
- What should staff do if something goes wrong?
- Where will this SOP be kept so the person responsible can find it?

That's your starting point. It doesn't need to be perfect. It needs to exist.

A FINAL REMINDER FROM RUBY

Your business should not depend entirely on your memory, your availability, or your ability to keep rescuing problems. Indispensability is not a badge of honour — it's a ceiling. Start with one process. Document it. Teach it. Use it. Improve it. Then move to the next.

ruby@rubyhayfordconsulting.com | +233 20 170 3633 | wa.me/233201703633

