



Somebody asked me, “How do we create standard operating procedures?” So I’m just going to give you the major steps here.

### **Step 1 – Involve**

The first one is you’ve got to involve anyone who’s part of this process. Involve the stakeholders. This will be the person who needs the job done to their complete satisfaction but may not be doing any parts of it.

It involves the person doing the job, and it involves anyone peripheral to that who needs to know whether there’s an accounting perspective, whether it’s a project management perspective, or a team manager, etc. So anyone who’s involved should be involved.

### **Step 2 – Define**

Then define the result that you want. What result do you want as a result of this standard operating procedure happening? I used an example before in analytics, we have to make an annotation.

So we would involve our webmaster, we would involve anyone publishing to my website and me the business owner. And the defined result is simply if we touch anything on our website, we make a note about it in Google Analytics.

### **Step 3 – Get ideas**

The next thing is we come up with the ideas, how do we get this result? Well luckily in that example, Google provides the solution. But if it didn't, we might open up a spreadsheet or a document where we note changes to our website.

So get everyone's ideas, you put them down on a post-it note or on a whiteboard, and then you arrange the ideas into order.

### **Step 4 – Arrange**

So it's step 1: when we make a change, we write down the change, step 2: we go to Google analytics, step 3: we click on the annotation, and step 4: we write down exactly what we did to the website, step 5: we save it, step 6: we refresh the screen, step 7: we check that the annotation is there. And then step 8 might be to review annotations once per week to make sure that the team still does it. That's basically it.

### **Step 5 – Refine**

And then you refine. Go through the standard operating procedure a few times and see if there are any steps that need to be changed, or don't work, or are unnecessary, or are missing.

### **Step 6 – Train**

And then you train. Train everybody on it. Say "Here's the standard operating procedure. This is what we do. We've checked it, it works. I want you to use it. Update it as you go." It's a fluid document.

So that's how standard operating procedures work.

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