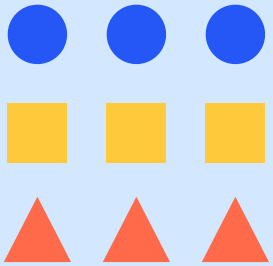
What to Document First

A 20-minute SOP checklist for founders who've become the bottleneck



HOW TO USE IT

List the processes your team runs every week or month. Score each one with the eight questions on page 2. The highest score is your first SOP.

STEP 1 List your recurring processes

Use these prompts to jog your memory. Jot down every process that comes to mind, then score them on page 2.

Clients	Onboarding a new client, handling a support request, renewals
Money	Sending invoices, approving expenses, running payroll
People	Onboarding a new hire, approving time off
Reporting	The weekly report, board or investor updates
Delivery	Kicking off a project, handing work from one team to another

STEP 2

Score each process

One point for every yes. Write your processes in the scorecard and tick each question that's true.

1. It happens at least once a month.
2. It runs through you, or through one person.
3. Someone has asked "how do we do this?" in the last month.
4. Different people do it different ways.
5. A mistake here costs money, a client or trust.
6. A new hire will need to do it in their first 90 days.
7. Work stops when the person who knows it is out.
8. A client or customer sees the result.

Process	1	2	3	4	5	6	7	8	Total
Example: sending invoices	✓	✓		✓	✓		✓	✓	*6*

6–8
Document it now.

3–5
It's next in line.

0–2
It can wait.

STEP 3

Before you write your first SOP

- [ ] Name one owner.
- [ ] Write down what "done" looks like.
- [ ] Capture it the easy way: talk it through, or record a voice memo while you do it.
- [ ] Write down what starts it (the trigger).
- [ ] List the tools it touches.
- [ ] Set a review date 90 days out.

More than three processes scored 6 or higher?

That's the sign it's time to get them out of your head all at once. The Core SOP Manual & Playbook Sprint turns 8 to 10 of them into procedures your team can run, in 30 days.

Book a free call →

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