

SOP Starter Kit

This guide will help you document your workflows, identify automation opportunities, and create repeatable systems that save time and reduce errors.

Use your list of critical workloads to develop your Standard Operation Procedures or SOPs. ***Don't have a list?*** [Download our Mission Critical Workload Log](#) to get started.

Activity 1: Create SOPs

For each workload, document the following information:

- Task Name
- Task Owner / Function
- Frequency (e.g., daily, weekly)
- Tools Used
- Step-by-Step Instructions
- Dependencies
- Notes or Exceptions



Include Screenshots or Video

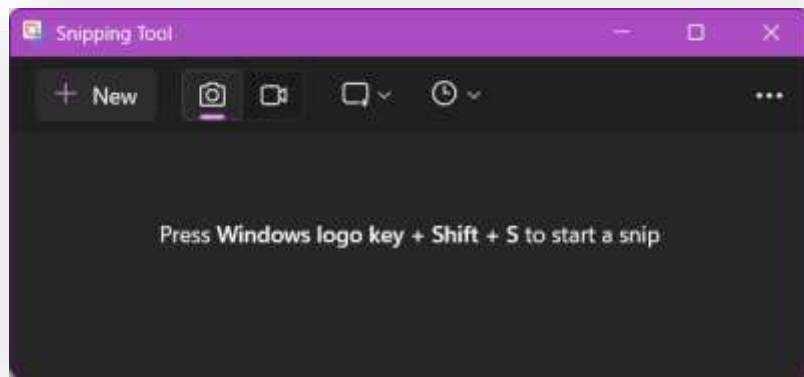
If the task involves a computer or cellphone, consider including screenshots with each step. You can use this format:

Step #	Instructions	Screenshot

Specialized screenshotting software like **Snagit** or recording apps like **Loom** can be useful for documenting your business processes.

Trying to keep your tech stack streamlined or just don't have the budget for another new tool?

Windows has a built-in Screenshot tool called **Snipping Tool** that also records video. Save your videos to a shared drive like **OneDrive** or **Google Drive** for team access.



On Mac you can use **Command + Shift + 5** to open a menu to choose between capturing the screen, a window, or a selection. Another option for web-based technology is the screenshot capabilities built into most major browsers.

Double Check for Accuracy

Once you have fully documented your process, ask a backup or teammate to complete the task with your instructions. This will help you identify any missing information.

If you work alone, try to complete the task using only your instructions. You can also ask a trusted colleague or friend to review your steps for any missing information.

Activity 2: Identify Opportunities for Automation

Once you have your process documented, look for opportunities to automate. Here are some signals that you may be able to automate a task:

- Look for tasks that are repetitive and rule-based.
- Identify steps that involve copying/pasting or manual data entry.
- Check if the task involves sending similar emails or notifications.

Before looking at third party tools like Power Automate, Zapier, or Make, determine what built-in automation is available. For instance, if email is involved, consider Outlook Rules or Gmail Filters. Many tools now have built-in integrations with other tools as well especially if you are on a paid plan.

To use an example from our business, **Eventbrite** can automatically send information to some Email Service Providers and CRMs (Customer Relationship Management software).

If you get stuck, [set up a call](#) and we will be glad to help!