

# OPERATIONS MANUAL GUIDE

A GUIDE TO CREATING A CENTRAL KNOWLEDGE BASE  
FOR ALL YOUR BUSINESS OPERATIONS

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Hey there!

You've landed on this Operations Manual Guide so it probably means you're on your way to organizing your business operations. Good for you!

Maybe you're here because you know the pain of having to search through a gazillion documents for bits and pieces of information. Or, all of this important knowledge rests in that big brain of yours and you're ready to take vacations without being pinged with all the questions. I truly hope this guide enables your organization to more smoothly scale AND enables you to sleep better at night. 😊

Having been in operations for companies with the desire to optimize efficiencies and scale, I've found it incredibly valuable to be able to find key information for a business in one central location. I hope you will too!

*MC*

Melanie Chandruang

Founder and Operations Consultant

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## A Step-by-Step Guide to Creating Your Own Operations Manual

### Structure & Layout

1. **Familiarize Yourself.** Take a scroll through the operations manual shell below to see what type of information is typically housed in a manual like this + how it's laid out.
2. **Documentation Hierarchy.** You'll see it only includes information typically included in an operations department for a small business. I recommend that each department keep their documentation separate to avoid confusion.
  - a. Note: This is not meant to act as a Company Manual or Employee Handbook but a manual for "back of the office" operations.
3. **Organized by Role.** It's organized in sections based on typical roles involved in operations. You may be in a stage where one person is handling all these roles. However, separating out by role will make it easier to parse out the responsibilities in the future if the company's path is to grow. The roles are:
  - a. HR
  - b. Finance
  - c. Business Administration

- d. IT
  - e. Office Management
4. **Table of Contents.** There's a table of contents (TOC) to easily navigate to each section. This TOC updates based on the body of the document with the use of the headers feature. Anything that's formatted as a header, will show up in the TOC. If you make a change to anything that's formatted as a header, make sure you click anywhere in the table of contents and hit the "refresh" button. This will update the TOC to match the body.

## Getting Started

1. **Edit High-level Content.** Make any edits to the hierarchy of information you'd like to document here. This'll be done in the body of the document and not through the table of contents.
  - a. You may want to add or remove sections that are relevant to your organization. An example is to add/remove relevant sections if you're a distributed organization.
2. **Fill in the Blanks.** Lastly, start filling in the information for your company's operations. Here's an example of what a particular section might look like:

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| <div><div>Benefits</div><div><div>1. Team Education Benefit</div><div><div>a. FT employees receive \$1,000 per year for continuing education<ul style="list-style-type: none"><li>This amount resets on January 1 each year</li><li>Unspent amounts do not roll over into the next year</li></ul></div><div>b. Qualified purchases: books on relevant topics, seminars/webinars registration fees, classes on specialization</div><div>c. Process for approval:<ul style="list-style-type: none"><li>An employee must submit a written request to their manager to use education funds with the following details included:<div><div>1. Cost of class/book/item</div><div>2. Date of purchase &amp; date of event (if applicable)</div><div>3. Learning goals clearly identified</div></div></li><li>Approval will not be considered for past purchases.</li></ul></div><div>d. Process for documentation:<ul style="list-style-type: none"><li>After approval is given to the employee, the manager must update the education balance in our <a href="#">HRIS</a>.</li><li>All receipts should be attached in this document as well</li></ul></div><div>e. Process for reimbursement:<ul style="list-style-type: none"><li>If approved, the employee must make the purchase within 15 days of receiving approval.</li><li>Employee must submit the receipt on the next pay period.<div><div>1. See <a href="#">Expense Reimbursement</a> for more info</div></div></li></ul></div><div>f. Review with manager:<ul style="list-style-type: none"><li>Following the event or after the employee has finished the book, the manager should discuss at the next 1 on 1.</li><li>Managers should ask about what the employee learned, how they hope to apply that knowledge, and identify if there are lessons to be shared with the team.</li></ul></div></div><div><div>2. Holidays Observed</div><div><div>a. The company is closed for the follow Federal Holidays:<ul style="list-style-type: none"><li>New Year's Day</li><li>Martin Luther King Jr. Day</li><li>Memorial Day</li><li>Independence Day</li><li>Labor Day</li><li>Thanksgiving Day</li></ul></div></div></div></div></div> |
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## Best Practices

1. **More Detail.** The more detail the better. Due to the nature of operations, there tends to be very little cross training. For this reason, you'll want to leave enough information that if someone else had to take over the responsibility, they'd be able to figure it out without your help. Too much information to list in this manual itself? Link the lengthy process in a separate document.
  2. **Make it Visual.** Include screenshots as some people are visual learners.
  3. **Video Training.** Speaking of visual learning, you can also include video recordings but only as long as the information *will not change...or at least not often*. The great part about written documentation is that if a part of the process changes, it's much easier to edit than re-recording an entire video.
  4. **Keep it Current.** Update as policies and processes change. This should be a living breathing document which is updated regularly.
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# **[Company] Operations Manual**

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3. Onboarding List for Contractors
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3. How to Pay Contractors
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### Software Tools and Apps

1. Tracking Tools and Apps
2. Adding or Removing people from Tools and Apps

## Office Management

### Lease and Building Maintenance

1. Lease Details and Landlord Info
2. Equipment Information (that needs to be maintained by lessee)
3. Approved Building Vendors
4. Ongoing Building Maintenance Routine
5. Parking
6. Programming the Alarm
7. Submitting a Maintenance Request

### Supplies

1. Ordering and Stocking Supplies
2. Approved Vendor List / Contact Info



## **Want help starting or finishing your operations manual?**

Drop me a line!

Email: [melanie@weconsult.io](mailto:melanie@weconsult.io)

Schedule a call: [calendly.com/melanieweconsult/](https://calendly.com/melanieweconsult/)

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