

Operations Manual Checklist V1.0

A good operations manual will be your company's backbone. It will be used for training and reference. It will facilitate process efficiency and quality consistency and reduce the time it takes for new hires to become productive. Finally, it will reduce liability and risk and add market value.

Operations Manual Checklist	
<input type="checkbox"/>	Company font, colours and logo
<input type="checkbox"/>	Version, publication date and author
<input type="checkbox"/>	Company contact information (address, email, phone, website)
<input type="checkbox"/>	Hours of operation
<input type="checkbox"/>	Key internal roles and contact information
<input type="checkbox"/>	3 rd party contact information (suppliers, vendors, support services, contract #, etc.)
<input type="checkbox"/>	Organizational chart
<input type="checkbox"/>	Roles and responsibilities; job descriptions
<input type="checkbox"/>	Target audience is clearly defined
<input type="checkbox"/>	Organized and structured layout
<input type="checkbox"/>	Accounting processes and procedures
<input type="checkbox"/>	Administration processes and procedures
<input type="checkbox"/>	Customer Service and Support processes and procedures
<input type="checkbox"/>	Field Operations processes and procedures
<input type="checkbox"/>	Health and Safety processes and procedures
<input type="checkbox"/>	Human Resources processes and procedures
<input type="checkbox"/>	Product Manufacturing processes and procedures
<input type="checkbox"/>	Information Technology processes and procedures
<input type="checkbox"/>	Sales and Marketing processes and procedures
<input type="checkbox"/>	Service Delivery processes and procedures
<input type="checkbox"/>	Glossary of terms
<input type="checkbox"/>	Reports, metrics and key performance indicators (KPIs)

Note that some companies also have employee handbooks. An operations manual is not intended to replace an employee handbook. An employee handbook will be focused on mission, culture and benefits, whereas an operations manual will be focused on process and procedure.

If your company has both, it is advised not to duplicate content between the documents, or someone will need to update content in two places when changes are made. Worse yet, if the content is not updated in both places, the company will end up with conflicting information to its staff and workers. Where information is required in both manuals, provide detail in one and include a reference to the correct manual in the other.

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Need help?



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