

SOP List

Generally speaking, you'll want your SOPs, instructions, organizational charts and checklists all in one place in your Company handbook. Honestly, if I tried to teach you how to create an SOP from scratch, you would probably fight me on sight. So I have added the links to the online systems that are already in place for you. I use Sweet Process for my clients, but you are welcome to experiment with whatever tickles your fancy.

This is a list of some tools available to assist you in building your Standard Operating Procedures:

SWEETPROCESS www.sweetprocess.com

SweetProcess is designed specifically to create Standard Operating Procedures. Use it to create detailed instructions, photos, screenshots, checklists and all of the documents necessary for your SOP. You can get even more detailed by creating step-by-step checklists for each task with files, images, and links to team resources.

Checklists can then be assigned to specific team members with set due dates. SweetProcess will also send an email reminder when a task deadline is close.

This is the program that I actually use the most. And it's free to try for 14 days. If you and your team like it, the business plan version will cost you \$39 per month.

PROCESS STREET www.process.st

A well-crafted SOP should contain more than just a checklist. It should include detailed instructions with diagrams, files and even videos to make sure it's easily understood. You can include this type of documentation alongside your checklists using Process Street.

Another nice feature in Process Street is when you check off one step in your project, the next step and its associated documentation appear so you can keep working seamlessly. Each checklist you create in Process Street is designed as a template which can be replicated. You can also schedule workflows to start automatically on a schedule. This helps keep your team on track through weekly or monthly jobs. Process Street's dashboard displays each process to help you track progress at a glance.

It's free to start using Process Street. The free version allows you to build unlimited checklists and share them with your team. Or, if you prefer, you can purchase access to advanced permissions, API access, versioning, reports and more for \$5/ month per user.

TRELLO www.trello.com

Trello is used primarily for project management but can also be used as a tool for documenting procedures. Each task on your list requires you to create a new card where you can then write detailed instructions in the form of notes and checklists.

Trello allows you attach files to cards, move items using a drag-and-drop interface and use comments to discuss progress with your team in real time. The free version of Trello gives you unlimited boards, lists, cards, members, checklists and attachments. Of course, they also offer upgrades starting at \$9.99/ month per user.



PIPEFY

www.pipefy.com

If you have complex projects with different potential end-result requiring a variety of steps, then you may need Pipefy.

Pipefy's workflows help make flexible standard operating procedures for any type of process. Upon completion of each checklist, Pipefy shows you the "Next Steps" and allows you to choose how the project will proceed. Then you'll see the next checklist for that particular route.

If you're unclear how to start making detailed workflows, Pipefy includes process templates for dozens of popular projects and workflows that you can adapt to your own specific needs. Pipefy is free for up to 100 cards. After that, paid packages start at \$5/month per user to create your own processes with integrations and API access.

EVERNOTE

www.evernote.com

You may already use the popular note-taking app, Evernote, but did you know it can also be used to create and store your SOPs? Using notes, you can create checklists, write up instructions and drag in your organizational structure diagram.

You can then organize your notes into notebooks to share with your whole team. If you need more options for collaboration, Evernote also includes team chat so you can discuss your work alongside your SOP documents.

The Evernote app is available for most devices and as a web app, so you and your team can access your SOPs from anywhere. As a bonus, Evernote allows you to revisit previous versions of your documents, so nothing important gets lost. I use Evernote to keep up with all of my random t-shirt ideas, including one that says "SYSTEMIZATION ROCKS!"

WUNDERLIST

www.wunderlist.com

Wunderlist is a user-friendly, free to-do-list app that works on almost any device. It allows you to create checklists for tasks and break them down with notes and detailed sub-tasks.

It isn't a full SOP tool but it works quite well for the checklist portion and, because you're able to create public lists that can be shared, Wunderlist works well for SOPs. You can leverage its collaborative features to assign tasks to your team members, log to-do items and keep the whole team in-sync.

WORKFLOWY

www.workflowy.com

Like Wunderlist, WorkFlowy is free, available on most platforms, includes some powerful collaboration features and can help you create basic, checklist-based SOPs.

What sets WorkFlowy apart is that it lists all of your information on a single page in bullet-point form. You'll find it easy to create and organize lists and sub-lists, but it's text-based and that can cause some communication issues. A detailed SOP that uses an abundance of images might have some problems in WorkFlowy.

