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Get organized! Creating SOP manual is easier than you think

If Angie Fuller hadn't discovered the Standard Operating Procedure manual her predecessor left, she wouldn't have known how to do her job.

"My predecessor left the day I started," says Fuller, who is the community outreach and development coordinator at the Allen Foundation. "It was like being thrown into the fire. I didn't know what my responsibilities were."

Once she'd settled into her new position, she began updating the SOP manual to accurately reflect her evolving role. That way, if she ever left her job—even for a weeklong vacation—someone else could easily take over.

Follow Fuller's tips to create an SOP manual for your role:

Use an existing format. "Not having a format to start with is a barrier," she says. "A fear exists—'What if I do this wrong?'—so people don't start at all. I was lucky: Some of the pages had already been done when I started."

Jot down tasks you do during a typical day, week, month, quarter and year, as you think of them."Then, just take one at a time and type out what you do to complete the task. When finished, start a new one," Fuller suggests.

Tip: If time is an issue, mark which tasks on your list are more important and do those first.

Create separate pages for each duty you perform, listing how often to do it, what steps to take, who can answer questions and where to find any necessary documents.

Include even small tasks. *Example:* Fuller says, "I think it's second nature to get the mail each day, but my co-workers depend on me delivering and receiving the items from the mail room twice a day at certain times, so I included the times in my procedure manual."

Be more detailed than you think you need to be. "It will benefit your replacement," she says. For example, in Fuller's manual, pages that cover fundraising procedures and data entry are extremely detailed.

"A tip that was given to me once was that if a 12-year-old could follow the instructions and do a task right, then it was detailed enough," she says.

Tip: For each task document you create, have a co-worker follow your instructions. If he can do the task flawlessly, you've done your job.

Use it to manage workload. Fuller says the manual has "saved a ton of headaches for me. I know I can go on vacation, and the critical jobs will be done without me, and I won't have stacks of work when I return."

7600 Leesburg Pike, Suite 300, Falls Church, VA 22043-2004 (800) 543-2002
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