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- Tutorial Library – Tech tool & process tutorials
- Custom Tutorials – 18 essential tools tutorials
- Custom Marketing Suite Software including site builder,
- video management, tracking, quiz engine
- And much more...

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Table of Contents

Production and Operations

- Steps in producing products or implementing services
- Quality review process
- Maintenance and inspection of equipment and tools
- Managing files and data

Human Resources

Hiring Employees

Recruiting Procedures

- Writing, placing, and managing job ads
- Contacting applicants
- Determining which candidates are called for an interview
- Setting up interviews
- System for note-taking so that other employees know whether a person has been contacted or not

Interviewing and Screening Procedures

- When and where interviews are conducted
- What questions are asked
- Management of interview notes

Policies for Considering Applicants

- Background checks
- Screening
- Checking references
- Checking certifications

Orientation and Training New Employees

- Teaching the new hire about your company's culture and policies
- Employee manuals
- Training sessions

Performance Evaluation

- When evaluations occur
- Who conducts evaluations
- How employee performance is evaluated
- How the results are communicated to employees
- System for promotions and pay raises

Other

- Employee conflicts
- Corrective actions
- Compensation
- Insurance
- Benefits
- Payroll policies
- Firing employees

Communications

- Answering and directing calls
- Sending interoffice memos
- Sending and managing emails
- Handling client and customer data
- Chain of communication for different events

Marketing and Sales

- Press releases
- Social media
- Public relations
- Advertisements
- Communication with the press
- Online marketing
- Talking with customers or clients about your products or services
- Preparing sales quotes and proposals
- Negotiating
- Following up
- Market research
- Marketing methods
- Tracking sales
- Specific marketing activities (i.e. direct mail, email marketing, social media, etc.)

Customer Service

- Response time to inquiries
- Delivery time and method of services or products
- Warrantees
- Returns and refunds
- Dealing with customer complaints
- Reputation management

Financial Operations

Bookkeeping Procedures

- Expenses
- Credits
- Transactions
- Assets
- Liabilities
- Procedures for creating, reviewing, and documenting budgets

Payment Policies

- How you take payments from customers or clients

Management of Account Documents

- System for managing, organizing, and storing account documents
- How you secure the documents
- How you protect your customers' privacy

Company Expenses

- Employee expenses and how they are reimbursed (i.e. travel, supplies, other work-related expenses)
- Which expenses are eligible for reimbursement
- How your employees get this reimbursement
- How reimbursement records are kept

Tax Assessments

- System for recording expenses for tax purposes
- Procedures for storage and management of tax documents
- Steps for filing and preparing for a tax audit

Financial Reporting and Analysis

- How regular reporting is done and measures taken to ensure that it is as accurate as possible

- Review process
- Performance appraisal procedures

Legal Operations

- Compliance review
- Industry regulations
- Correspondence requirements
- Response to legal letters

Privacy

- What information you collect
- What you share and with whom
- How information is kept private
- Measures you take to ensure privacy

Accessibility

- Accessibility to the disabled
- Disaster preparedness

Computers and IT

Hardware and Software Management

- How programs are maintained and kept running smoothly (i.e. evaluating programs, upgrading software)
- Rules about access to certain software
- Password management

System Security

- Managing passwords and access
- Periodically changing passwords
- Conducting in-company security audits
- Upgrading security systems
- Making improvements to security systems

Internet Policies

- What is allowed and what is not allowed at work
- Restrictions on what files can be downloaded or shared online

Other

- Troubleshooting
- Security Training
- How computers are used in your company

SOPs for Freelancers

Sales Process

- Standard rates
- Pricing structures
- Guidelines on how to communicates with customers
- Procedures for accepting or turning down jobs

Marketing

- Email marketing broadcasts
- Blog posting
- Website updates
- Social media activity
- Posting of ads
- Etc.

Workflow

- Handling deadlines
- Establishing priority
- What times you work on certain regular jobs

Accounts and Billing

- Taking payments
- Financial transactions
- Business expenses
- Managing recurring payments
- Paying taxes
- Audits
- Etc.

Following SOPs

- System for ensuring your SOPs are being followed (system to make sure they are being read, conduct regular audits and review to improve them)

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