Christine Comaford
ASSOCIATES

OPTIMIZING YOUR DAILY OPERATIONS: STANDARD OPERATING PROCEDURES TO STREAMLINE YOUR OPERATIONS

Kits
RESOURCES

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How to Write a SOP

Name of Procedure
How To Write A Standard Operating Procedure

Purpose
How to write an effective SOP so that readers are able to complete the task in question and so that all SOPs are written in a similar format for consistency. See also: http://screencast.com/t/a0Oq6BFGbU3

1. Outline Your Task	
1.1	Before writing your SOP, be sure to outline the major components or steps that are required to complete
1.2	When you have the major components in place, then write the specific actions that are required for each area – be as clear, direct and specific as possible.
1.3	Test your steps to ensure accuracy and completeness.

2. Writing Your SOP	
2.1	Open the SOP-TEMPLATE.doc template.
2.2	Under the "File" menu, select "Save As" to create a new file for your SOP
2.3	Name your file using the following convention: DEPT-Specific-SOP-Name-MMDDYYYY.doc * DEPT is the specific Mighty Ventures program or department to which the SOP directly relates – for example, BGB, BAM or MKTG.
2.4	Complete the SOP by transcribing the steps outlined in step 1 above into the SOP template.

	* Each major component should be in its own table for clarity

3. Record a Video SOP if Applicable If your SOP relates to a computer-based task, it may be advisable to document the SOP in a video recording using Jing (www.jingproject.com)	
3.1	Launch JING on your computer
3.2	Open the document or website to which your SOP pertains
3.3	Record a screen capture video (no longer than 5 minutes) while outlining the steps verbally as you go along
3.4	Upload the completed video to the JING servers
3.5	Paste the JING URL in the “Purpose” field of your SOP with a “See Also” reference
3.6	Save the completed SOP file

4. Delete Extra Rows & Tables from SOP Master (if applicable)	
4.1	When complete, clean up your SOP document by deleting any extra rows or unused tables from the document
4.2	Save the modified SOP file

5. Upload SOP Document to Box.net	
5.1	Visit www.box.net and log in with your unique credentials
5.2	Navigate to the SOP folder (follow the “internal docs” link) and the sub-folder for the specific department of your SOP
5.3	Click the “Upload” button

5.4	In the new window that appears, click “Add Files”
5.5	In the dialog window, locate the SOP file on your computer, then click “Open”
5.6	Click “Upload” to add the file to box.net

SOP Example – How to Set Up InstantTeleseminar Event with Slides

Name of Procedure
How To Set Up An Instant Teleseminar Event

Purpose
Set up a teleseminar/tele-webcast event using Instant Teleseminar as a service provider

1.Log in to Instant Teleseminar	
1.1	Visit http://instantteleseminar.com/members
1.2	Enter member credentials: Member ID: xxxxxxxxxxxxxxx Password: xxxxxxxxxxxxxxx
1.3	Click the "LOGIN" button LOGIN

2. Create New Event	
2.1	Click the yellow "Create New Event" button at the top of the main page
2.2	Event Name: Type a name for your event (will be visible to clients)
2.3	Event Date: Select the date from the calendar
2.4	Official Start Time: Set the start time including time zone
2.5	Official Start Time Text: Usually leave as is, but is editable
2.6	Event Duration: Set the duration of the event – better to set it longer than needed
2.7	Number to Dial: Always use "Host Mode"

2.8	Publishing Method: Select a template that suits the topic of the teleseminar being conducted
2.9	Event type: Usually Phone + Web, but can select one or the other
2.10	Click “Next” to create the event and further customize the details

3. Customize an Event	
3.1	After creating an event, you can then customize various settings and options NOTE: to edit the details of an event you created in the past simply click the event name in the list of events when you originally log in or by clicking the “My Events” tab in the menu
3.2	Photo: This will allow you to add a custom photo to the publicly viewable page
3.3	Big Button & Links: This allows you to create call to action buttons and links that you can reference during your call
3.4	Pre-event Page Settings: Enable Q&A, buttons, links and other settings on the page that visitors will see prior to the actual teleseminar
3.5	During-event Page Settings: Enable Q&A, buttons, links and other settings on the page that visitors will see prior to the actual
3.6	Replay Page Settings: Enable Q&A, buttons, links and other settings on the page that visitors will see prior to the actual
3.7	Publish & Promote Your Event: The public webcast link and other details you can use to send to your event participants

4. Use a Power Point Presentation during your event Video tutorial: http://screencast.com/t/MmQ5MDcyM	
4.1	Upload a new presentation by clicking the “My Slides” link in the navigation menu, then the “Create a New Presentation”

4.2	Enter the Presentation Name, Author and locate the file on your hard drive, then click “Upload”. NOTE: the file cannot be more than 25MB and the filename cannot have any spaces – replace with dashes or underscores instead
4.3	The file will have to be converted so make sure you upload your document prior to your scheduled event
4.4	To use the slide during your presentation, load the Event Control Panel and click the “Slides” button in the control panel menu. (Click “yes” to take control of the slides if a dialog box appears.)
4.5	From the list of available presentations, click the name of the presentation you would like to use.
4.6	Use the slide navigator on the right and/or the “next/last” buttons at the bottom to move through your slides.


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