

THE BEGINNER'S BUSINESS OPERATIONS GUIDE

HOW DO I RUN MY BUSINESS WITHOUT DOING EVERYTHING MYSELF?

ORGANIZE > DOCUMENT > AUTOMATE > IMPROVE

STOP DOING EVERYTHING. START BUILDING SYSTEMS.

WELCOME

Starting a business means wearing a lot of hats. As customers arrive, small tasks begin piling up: answering questions, sending quotes, tracking orders, scheduling work, and following up.

You do not need a large team or complicated software to operate professionally. You need a simple way to see what needs to happen, who is responsible, and how to deliver a consistent customer experience.

This guide helps you document the work, organize your week, build repeatable processes, and decide what to improve next. Every worksheet is fillable on your computer.

YOUR OPERATIONS STARTING POINT

MY BUSINESS

THE TASK THAT CONSUMES THE MOST TIME

**GOOD OPERATIONS MAKE YOUR BUSINESS MORE RELIABLE,
NOT JUST MORE BUSY.**

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STEP 1

UNDERSTAND DAILY OPERATIONS

Operations are the repeated activities that keep your business working after the sale.

CUSTOMER WORK

Answer inquiries, schedule, deliver and follow up.

ADMIN WORK

Track payments, records, invoices and paperwork.

DELIVER WORK WHEN DO I OPEN OR START WORK?

BUSINESS SUPPORT

WHAT HAPPENS DURING A TYPICAL CUSTOMER JOB?

WHAT MUST HAPPEN AT THE END OF THE DAY?

WHAT CURRENTLY GETS FORGOTTEN OR DELAYED?

STEP 2

FIND REPETITIVE TASKS

Write down what you do repeatedly. Those tasks are candidates for checklists or systems.

☐ Respond to inquiries☐ Send estimates☐ Book appointments☐ Collect payments☐ Prepare orders☐ Order supplies☐ Update customers☐ Deliver services☐ Follow up☐ Request reviews☐ Post marketing☐ Reconcile records

WHICH THREE TASKS TAKE THE MOST TIME?

WHICH TASK CREATES THE MOST MISTAKES?

WHICH TASK SHOULD I DOCUMENT FIRST?

STEP 3

BUILD YOUR FIRST SOP

An SOP is a written standard operating procedure: simple instructions for doing a repeatable task.

PROCESS NAME**PERSON RESPONSIBLE****WHEN DOES THIS PROCESS BEGIN?****STEP 1****STEP 2****STEP 3****STEP 4****STEP 5****HOW DO I KNOW THE TASK IS DONE CORRECTLY?**

STEP 4

ORGANIZE YOUR WEEK

Give recurring work a time and place so important tasks stop depending on memory.

	PRIORITY WORK / RECURRING TASK
MONDAY	
TUESDAY	
WEDNESDAY	
THURSDAY	
FRIDAY	
SATURDAY	
SUNDAY	

WHEN WILL I HANDLE UNEXPECTED WORK?

STEP 5

CREATE A CUSTOMER WORKFLOW

A clear customer journey makes your business easier to run and more predictable.

01 INQUIRY**HOW DOES A CUSTOMER CONTACT YOU?****02 QUALIFY****WHAT DO YOU NEED TO KNOW?****03 QUOTE / BOOK****HOW DO YOU CONFIRM THE OFFER?****04 DELIVER****WHAT HAPPENS WHILE DOING THE WORK?****05 PAYMENT****WHEN AND HOW DO YOU GET PAID?****06 FOLLOW UP****WHAT HAPPENS AFTER DELIVERY?**

STEP 6

MANAGE TOOLS AND SUPPLIES

Keep enough of what you need without tying up too much cash in inventory.

ITEM	CURRENT	REORDER AT	SUPPLIER

HOW OFTEN WILL I CHECK SUPPLIES?

STEP 7

SET UP SIMPLE AUTOMATIONS

Automate repeatable, low-risk tasks after the process is clear and working.

CONFIRMATIONS

Automatically confirm bookings or orders.

REMINDERS

Send upcoming appointment or payment reminders.

RECORD KEEPING

Log form responses or new orders in one place.

FOLLOW UPS

Send a message after a completed purchase.

TASK I WANT TO AUTOMATE

WHAT EVENT STARTS IT?

WHAT SHOULD HAPPEN AUTOMATICALLY?

HOW WILL I CHECK FOR ERRORS?

STEP 8

KNOW WHAT TO DELEGATE

Delegation works best when the task is clear, repeatable, and measurable.

KEEP

Needs your judgment, expertise or relationships.

DOCUMENT

Repeatable but not yet written down.

AUTOMATE

Rules-based task with predictable outcomes.

DELEGATE

A clear process another person can follow.

TASK I MIGHT DELEGATE**WHY DOES IT MAKE SENSE TO DELEGATE?****WHAT DOES A SUCCESSFUL RESULT LOOK LIKE?****HOW WILL I CHECK QUALITY?**

STEP 9

QUALITY-CONTROL CHECKLISTS

A final check helps you catch problems before the customer experiences them.

- | | |
|---|---|
| ☐ Correct customer and order details | ☐ Materials or tools ready |
| ☐ Work matches agreed scope | ☐ Quality inspected |
| ☐ Customer updated | ☐ Invoice or payment correct |
| ☐ Completion confirmed | ☐ Follow-up scheduled |

MY BUSINESS-SPECIFIC QUALITY CHECKS**WHO COMPLETES THE FINAL CHECK?****WHAT HAPPENS IF SOMETHING FAILS?**

STEP 10

TRACK OPERATIONAL PERFORMANCE

Choose a few useful numbers instead of creating a complicated dashboard.

METRIC	THIS WEEK	TARGET
Orders or jobs completed	<input type="text"/>	<input type="text"/>
On-time completion rate	<input type="text"/>	<input type="text"/>
Customer complaints	<input type="text"/>	<input type="text"/>
Rework or mistakes	<input type="text"/>	<input type="text"/>
Hours spent per job	<input type="text"/>	<input type="text"/>
Unfulfilled orders	<input type="text"/>	<input type="text"/>

WHAT WILL I IMPROVE NEXT WEEK?

STEP 11

7-DAY OPERATIONS CHALLENGE

Make one practical improvement each day. Small changes compound.

DAY 1

Map a typical workday

☐**DAY 2**

List repeated tasks

☐**DAY 3**

Write one SOP

☐**DAY 4**

Organize the weekly schedule

☐**DAY 5**

Map the customer workflow

☐**DAY 6**

Create a quality checklist

☐**DAY 7**

Review and choose one improvement

☐

STEP 12

BUSINESS OPERATIONS SCORECARD

Rate each statement from 1 (needs work) to 5 (strong). Check one score per row.

1. I know the key steps in my daily operations.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. I can identify my most repetitive tasks.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. I have written instructions for important tasks.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. I use a weekly plan to prioritize work.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. My customer journey is clearly defined.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. I can track essential tools and supplies.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

7. I check quality before delivering work.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

8. I monitor operational results.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

TOTAL SCORE / 40

LOWEST-SCORING AREA

YOUR 30-DAY OPERATIONS PLAN

Choose one improvement you can implement and measure this month.

MY MAIN OPERATIONS GOAL

THE RECURRING PROBLEM I WILL FIX

THE PROCESS I WILL DOCUMENT

WHAT I WILL SCHEDULE WEEKLY

WHAT I WILL AUTOMATE OR DELEGATE

THE NUMBER I WILL TRACK

WHAT SUCCESS LOOKS LIKE AFTER 30 DAYS

RUN SMART. BUILD BIGGER.

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PLAN. VALIDATE. BUILD. GROW.

