



D-SRC Operations Plan Outline

Develop your current and future operations plans using the below outline. Copy your responses in the D-SOURCE Fillable Operations Plan Template.

I. Operations Summary

Mission & Vision

Mission: What is the daily goal? To sell what unique product/service to whom? And Why?

Vision: What is the long-term goal? What transformative impact are you aiming to have in your market?

S.M.A.R.T (Specific, Measurable, Attainable Relevant, and Time Bound) Goals and Objectives

Describe 3+ S.M.A.R.T actions your company must take to achieve your mission and realize your vision.

Hours of Operation & Location(s)

List the days and times that the company is open for sales and customer service.

List the location(s) used for product development, preparation, sales and customer service

II. General Management

Leadership Assessments

Describe your internal evaluation process. How do you assess outcomes and improve?

Procurement, Contracts, and Agreements: Describe how general managers work with legal professionals to develop and execute sound agreements with partners, suppliers, and clients.

Partnerships: Describe the purpose/importance of each partner involved in production and sales.

Suppliers: List all the company's hardware and software suppliers. How does each support product development and sales? How much of each suppliers' product does the company use/buy? How often?

Retail Management and Sales: How do General Manager(s) support product preparation, sales setup, and personnel oversight? What is the closing and reconciliation process after each sales day? How do personnel convene to adjust goals prior to, during, and following completion of a project or sales day?

III. Administration and Accounting

Describe how the company tracks and monitors revenues and expenses. What software and applications are used? How and when are revenue/expense reports reviewed and reconciled?

IV. Human Resources

Hiring: What kind of talent does the company employ? Describe the candidate selection process.

Onboarding and Training: Describe the onboarding process for new employees and contractors. How long is the training and probationary period(s) for new hires? Describe any requirements.

Personnel Requirements: Describe dress code(s), licensing, and/or trainings required of personnel?

Recordkeeping: Describe time recording processes for employees. How are project or sales goals documented? What consistent evaluations are used to ensure time and resources are maximized? Describe any personnel requirements specific to your business or industry.

Personnel Assessments and Discipline: Describe how feedback is exchanged with employees. Under what circumstances do employees earn additional pay opportunities? Describe disciplinary procedures.

V. Product Development

Describe who prepares products/services, how, and the development location

VI. Marketing Strategy - Download the D-SRC 'Marketing Plan' Template(s)

Describe how the company promotes its offerings.

VII. Customer Service Model

Describe the steps that lead to a sale when customers arrive at your doorstep; options for purchasing; methods of payment accepted; service delivery; and customer service resolution process.

VIII. Appendix

DSOURCE Templates

- D-SRC Marketing Plan

Company Files

- Job Descriptions, Training Manuals, and Company Policies