

Service Business Systems & SOPs — Workbook

This workbook turns the course into a working operating system for your own service business. Move through it in order: inventory and prioritize your processes, write your first SOPs and checklists, define who owns what and start delegating, then install the KPIs, review rhythm, and step-back plan that let the business run without you. Use the templates to build a process register, a reusable SOP, a delegation tracker, and a weekly scorecard so every decision rests on a documented system rather than on your memory.

Why Systems, and Mapping Your Core Processes

Make the case for systemizing to yourself, then surface and prioritize every recurring process so you document the right things first.

Exercise: Run the Bus Test on Your Business

Honestly assess how dependent the business is on you right now. This sets your baseline and reveals the most urgent gaps to document.

- If you disappeared for six weeks with no contact, what would break first, and how long until it caused real damage?

- List the top five tasks or decisions that only you can currently do, and why no one else can.

- Which of the four payoffs of systemizing (consistency, capacity, speed to competence, transferable value) matters most to you right now, and why?

- What is your honest estimate, as a percentage, of how much of the business would keep running correctly without you today?

Worksheet: Process Inventory by Function

Walk the full customer and job lifecycle and list every recurring process under each function. Aim for completeness over polish; you can expect 60 to 120 processes for a small service business. Marketing and lead generation processes (how inquiries are created and answered)

Sales and quoting processes (qualify, estimate, present price, follow up)

Onboarding processes (set up, schedule, prepare a new client)

Service delivery processes (the core paid work, step by step)

Finance and admin processes (invoicing, collections, payroll, bookkeeping)

People processes (hiring, training, scheduling, reviews, offboarding)

Customer care processes (complaints, follow-up, review requests, retention)

Recurring questions your team asks you each week (each one is a missing SOP)

Worksheet: Prioritization Scorecard

Score each process from your inventory one to five on three dimensions, then add them for a priority total. Sort descending to find the vital few to document first.

Process name

Frequency score 1-5 (daily/every-job = 5)

Pain and bottleneck score 1-5 (inconsistent, owner-trapped = 5)

Risk and cost-of-error score 1-5 (safety/money/compliance/trust = 5)

Priority total (sum of the three scores)

Is the process stable and worth keeping as-is? (yes / fix first / redesign first)

Sprint rank (top five = first sprint)

Checklist: First-Sprint Setup

- Process inventory captured in a spreadsheet with one row per process
- Every process tagged with function, frequency, current owner, and SOP-exists flag
- All processes scored on frequency, pain, and risk and sorted by priority total
- Broken or about-to-change processes flagged to fix or redesign before documenting
- Top five priority processes chosen as the first sprint
- At least one personally annoying process included in the first five for a quick win
- Realistic cadence committed (one to two SOPs per week)

Writing SOPs People Actually Follow

Write your first SOP in a consistent template, choose the right medium and storage, and harden it with checklists, templates, and automation.

Worksheet: Draft Your First SOP

Pick the number-one process from your prioritization scorecard and fill in every field of the standard template. Start each step with an action verb and write so a new hire could follow it cold.

Title and unique ID (e.g., SALES-002)

Purpose (one or two sentences on what it achieves and why)

Scope and trigger (when it applies and the event that starts it)

Owner (accountable) and roles performing each step

Materials and tools needed (software, logins, equipment, templates)

Step-by-step instructions (numbered, one action per step, decisions stated as if-then rules)

Definition of done and quality check (how to know it is finished correctly)

Version number and last-reviewed date

Exercise: Choose Medium, Tools, and Home

Decide how each SOP will be captured and where the library will live so the team actually reaches for it in the moment of work.

- For your first three SOPs, which medium fits best (written doc, checklist, or short video), and why?
 - Which capture tool will you use to record once instead of writing from scratch (Loom, Scribe, Tango)?
 - What is your single source of truth for the library (Google Drive/Notion, Trainual/SweetProcess/Process Street, or your job-management software), and what is the rule that nothing operational lives anywhere else?
 - On what device will the people doing the work actually open the SOP, and is access frictionless there (e.g., a phone-tappable checklist for technicians)?
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Worksheet: Build a Killer-Item Checklist

Turn a high-risk or multi-step procedure into a short checklist of only the items most often missed. Choose the style that fits who will run it.

Procedure this checklist supports

Checklist style (do-confirm for skilled/familiar work, read-do for new staff or high-risk)

The 5 to 9 critical killer items (the steps most often forgotten, not the obvious ones)

Trigger point (when in the job the checklist is run)

Who confirms completion and where it is recorded

Checklist: Error-Proofing and Validation

- SOP drafted in the standard template with screenshots or a short video where showing beats telling
- Draft tested by having someone who does not normally do the task follow it while you watch silently
- Every hesitation, guess, or question from the test fixed in the document
- Reusable templates built for repeated outputs (quote, proposal, onboarding email, invoice, service report)
- Saved email and message templates created for common client situations
- Repetitive, rules-based steps identified as automation candidates (reminders, review requests, invoicing, lead intake)
- At least one automation built with Zapier/Make or built-in CRM tools and tested end to end

Org Structure, Roles, and Delegation

Define every function and a single owner, hand off whole outcomes against your SOPs, and train people to run the system with verified competence.

Worksheet: Build Your Accountability Chart

Map the functions the business needs filled, then assign exactly one accountable name to each seat. It is fine to put your own name in several boxes; that makes your overload visible.

Sales and marketing seat — single accountable owner

Operations and service delivery seat — single accountable owner

Finance and admin seat — single accountable owner

People and customer care seat — single accountable owner

Seats where your own name appears (the hand-off backlog)

Which seat to hand off first as you hire or promote

Any seat currently with shared (i.e., no) accountability to fix

Worksheet: Write a Role Scorecard

For one seat you want to hand off, define success in measurable outcomes and tie it to the SOPs and KPIs that role owns.

Seat / role name

3 to 7 measurable outcomes the role is accountable for (with target numbers)

Key SOPs this role owns and runs

KPIs that measure whether the role is succeeding

Authority boundaries (what they decide alone vs. what needs the owner)

Exercise: Plan a Real Delegation

Choose one outcome to hand off this month and run it through the repeatable hand-off process instead of just dumping a task.

- What outcome are you delegating, stated as a measurable result and standard (not just a task)?
 - Does a current SOP exist? If not, when will you record yourself doing it once to create one?
 - What can this person decide alone, and what must still come to you?
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- What is your train-then-taper plan (do it together, they do it watched, they do it solo with spot checks) and the metric plus check-in that closes the loop?
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Checklist: Training and Redundancy

- New-hire onboarding mapped to the SOP library in priority order for their seat
- Each procedure taught with the four-step method (prepare, demonstrate, try out, follow up)
- Skills matrix built: people down the side, core processes across the top, marked do-unsupervised yes/no
- At least two people able to perform every core process (no new single point of failure)
- Competence verified by an observed correct run, not just told
- Sign-off recorded for who is cleared on which SOP (spreadsheet tick or tool quiz)
- Cross-training rotation or schedule set to keep redundancy alive

Measuring, Maintaining, and Stepping Back

Install a short KPI dashboard and weekly review, keep SOPs alive with owners and review dates, and execute a staged plan to move from operator to owner.

Worksheet: Design Your KPI Dashboard

Pick a handful of leading and lagging metrics across functions, each with a target and an owner who also owns the related seat. Keep it scannable in minutes.

Sales metrics and targets (leads, quote-to-close rate, new bookings)

Service delivery metrics and targets (on-schedule rate, callback/rework rate, completion time)

Quality and client metrics and targets (satisfaction/review rating, complaints, retention)

Finance metrics and targets (revenue vs. target, days to get paid, labor % of revenue)

People metrics and targets (utilization, open seats, training gaps)

Owner assigned to each KPI (matches accountability chart seat)

Weekly meeting day and time for the scorecard review

Exercise: Diagnose Systems From the Numbers

Use a drifting metric as a signal that a system is missing or unclear, rather than blaming a person, and decide which SOP to fix.

- Which KPI is currently off target or trending the wrong way?
 - Which SOP or missing process does that metric point to (e.g., rising callbacks = service-delivery checklist gap)?
 - What specific change to the SOP, checklist, or training would fix the root cause?
 - Who owns the fix, and by when will the updated procedure be in use?
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Checklist: Keep SOPs Alive

- Every SOP has a named owner and a review date
- Standing cadence set: core SOPs reviewed at least annually, high-change ones more often
- Version and last-reviewed fields kept current so documents can be trusted
- Frictionless channel exists for the team to flag outdated or improvable procedures
- Update triggers defined (tool/supplier change, mistake or near-miss, KPI problem, regulation change, better way found)
- Updated versions communicated to everyone affected
- A single steward owns the documentation system overall

Worksheet: Operator-to-Owner Step-Back Plan

Sequence your own removal from operations over the next few quarters and set a measurable gauge of progress.

Vital-few SOPs to complete this quarter

Administrative and routine tasks to offload first (and to whom)

Service-delivery work to hand off next (with redundancy built)

Manager or lead to own day-to-day operations and the weekly scorecard

Current percentage of decisions/tasks that still require you personally (baseline)

Target percentage and date for the next quarter

Planned offline-week test date to expose remaining gaps

Your Action Plan

1. Build your process inventory: list every recurring process by function, aiming for completeness over polish.
2. Score each process on frequency, pain, and risk, then sort to find the vital few to document first.
3. Write your top-priority SOP in the standard template and validate it by having someone follow it while you watch.
4. Set up one central, searchable home for the SOP library and make the rule that nothing operational lives elsewhere.
5. Turn a high-risk procedure into a short killer-item checklist and build automations for repetitive, rules-based steps.
6. Draft your accountability chart with a single owner per seat, and write a role scorecard for the first seat to hand off.
7. Delegate one measurable outcome against its SOP using the train-then-taper hand-off process.
8. Cross-train and verify a second person on every core process so no one becomes a new single point of failure.
9. Stand up a short KPI dashboard and run a weekly scorecard review to catch problems early.
10. Schedule SOP reviews with named owners, then execute your operator-to-owner step-back quarter by quarter.

