

Business _____ Location _____ Date _____

The business

What the business does, who it serves, its locations and opening hours, and the standards every customer should experience.

Organization and roles

The roles in the business, what each is responsible for, who they report to, and who covers when someone is away.

Daily, weekly and monthly operations

The routines that keep the business running, such as opening and closing, cleaning, stock counts and reporting, with who does each and the checklist or SOP for it.

Customers

How sales, bookings, service, complaints and refunds are handled, and the standards for each.

Suppliers and stock

Key suppliers, how orders are placed and checked, stock levels, and what to do when something doesn't arrive.

People

Hiring, onboarding, rosters, leave, training, and performance, with the policies that apply.

Finance

Cash handling, payments, invoicing, expenses and approvals, and month-end, with approval limits for each role.

Health and safety

The main hazards, safety procedures, incident reporting, first aid and inspections.

Systems and access

The software and tools used, who has access, and where files and passwords are kept (never the passwords themselves).

Emergencies and business continuity

What to do in a fire, a power or system outage, a key person's absence or a serious complaint, and who to call.

Keeping the manual current

Who owns each section, how changes are made and shared, and when the manual is reviewed.
