BUSINESS SYSTEMS & GROWTH ADVISORY

Research • Strategy • Solutions • Impact

SYSTEMS TOOLKIT
SOP / OPERATIONS MANUAL

Standard Operating Procedures for Efficient, Effective and Scalable Operations



Standardise Operations

Improve Performance

Drive Innovation

Achieve Growth

SYSTEMS TOOLKIT: OPERATIONS MANUAL

A working template for documenting how your business actually runs (SOPs), handover process, and decision rules, so it can run without you standing in the room.

BUSINESS NAME	[Enter business name]
PREPARED BY	[Enter your name / role]
VERSION / DATE	[e.g. v1.0 / August 2026]
NEXT REVIEW DATE	[Set a 6 - 12 month checkpoint]

www.danbywell.c

TEMPLATE BY

BUSINESS SYSTEMS & GROWTH ADVISORY
Research • Strategy • Solutions • Impact

SHEET 00 / READ ME

How to Use This Template

This template exists to close three gaps that trap most founders inside their own daily operations: no written SOPs, no handover process between shifts or people, and no agreed rules for who can decide what. Fill it in once, properly, and review it on a fixed schedule rather than only when something has already gone wrong.

KEY

Yellow cells - type your own content here. Everything else is instructional or a worked example.

Worked examples - shown in each section so you can see the level of detail expected before you write your own.

Before you start

a. Read Section 1 first and complete the business overview, everything after it should be written with that context in mind.

b. Don't aim to complete on the first pass. A short SOP that exists beats a perfect one that is still "in progress" six months from now.

c. Write each SOP for the newest, least experienced person who might have to do that task, not for yourself.

d. Duplicate the blank forms in the Appendix as many times as you need; this template is a starting structure, not a fixed page count.

Keeping it alive

An operations manual that isn't reviewed becomes fiction within a year. Use the Review & Update Log in Section 6 every time something changes - a new supplier, a new discount policy, a process that stopped working the way it was written. A manual that's slightly incomplete but current is far more useful than one that's thorough and two years out of date.

www.danbywell.co

SHEET 00 / CONTENTS

Contents

Right-click the contents above and choose "Update Field" after you finish editing, so page numbers reflect your final document.

www.danbywell.com

SHEET 01 / FOUNDATION

01 Business Overview & Purpose

Before documenting individual procedures, capture the context a new manager, partner, or investor would need to understand how the business is structured and what it exists to do.

Business name	[Enter business name]
Core service / product	[What you sell, in one sentence]
Location(s)	[Site(s) this manual covers]
Number of staff	[Total headcount]
Owner / founder	[Name and role]
Mission - one sentence	[Why this business exists, beyond profit]

Team structure

List the roles in the business and who reports to whom. This doesn't need to be a formal organisation chart - a simple list works, and it's the reference point every SOP and decision rule in this manual will point back to.

Role	Name (if filled)	Reports To
Owner / Founder		—

www.danbywell.com

SHEET 02 / STANDARD OPERATING PROCEDURES

02 Standard Operating Procedures (SOPs)

An SOP answers one question: if someone new had to do this task tomorrow, how would they know exactly what to do? Write each one for the newest, least experienced person on your team - not for yourself. Two worked examples are shown below, followed by blank forms for your own procedures. Duplicate the blank form for every SOP your business needs.

Worked example 1 : Guest / Customer Check-In

SOP Title	**Guest Check-In**
Trigger [when to use this]	A new guest or customer arrives to begin their stay or transaction.
Step-by-step instructions	1. Greet the guest within 30 seconds of arrival. 2. Confirm booking details against the reservation system. 3. Collect ID and complete the secure guest register, never an open, shared page. 4. Take payment or confirm billing arrangement. 5. Hand over room key / product and explain any house rules or next steps. 6. Log the check-in as complete in the daily handover log (see Section 3).
Responsible role	Front Desk / Reception
Review frequency	Every 6 months, or immediately after any guest complaint related to check-in.

Worked example 2 : Guest Complaint Resolution

SOP Title	Guest Complaint Resolution
Trigger: when to use this	A guest raises a concern or complaint, in person, by phone, or in writing.
Step-by-step instructions	1. Listen fully before responding, do not interrupt or defend. 2. Check the Decision Rules table (Section 4) for pre-approved resolution authority. 3. If within your authority, resolve on the spot and log the resolution. 4. If outside your authority, escalate immediately using the path in Section 4, do not leave the guest waiting without an update. 5. Record the complaint and resolution in the handover log, even if fully resolved.
Responsible role	Any staff member on duty; escalation to Duty Manager
Review frequency	Every 6 months, or after any complaint that was mishandled.

Your SOP 1

SOP Title	
Trigger, when to use this?	
Step-by-step instructions	1. 2. 3. 4. 5.
Responsible role	
Review frequency	

Your SOP 2

SOP Title	
Trigger: when to use this	
Step-by-step instructions	1. 2. 3. 4. 5.
Responsible role	
Review frequency	

www.danbywell.com

Your SOP 3

SOP Title	
Trigger - when to use this	
Step-by-step instructions	1. 2. 3. 4. 5.
Responsible role	
Review frequency	

Need more? Copy pages from this section for every additional procedure for instance; check-out, cash handling, opening/closing, supplier receiving, and so on.

www.danbywell.

SHEET 03 / HANDOVER PROCESS

03 Handover Process

Most operational knowledge dies at the end of a shift. A handover log carries it forward, so the next person starts by reading what happened, not by rediscovering it the hard way. Keep this log running daily; it doesn't need to be formal, but it does need to be consistent.

Worked example

Date	Shift	Outstanding Item	Action Required	Handed To	Done?
14 Aug	Day	Room 4 tap leaking, guest notified	Call maintenance before 6pm check-ins	Night shift	☐

Your daily handover log

Date	Shift	Outstanding Item	Action Required	Handed To	Done?

Copy this table into a new page for each week, or keep it running in a shared notebook / spreadsheet / WhatsApp-based log at your reception or duty station.

SHEET 04 / DECISION RULES

04 Decision Rules & Authority Matrix

This is the single most valuable table in the manual. It defines what your team can decide on their own, and what must come back to you, so most decisions get made on the spot, and only genuinely unusual situations reach you.

Worked examples

Decision Type	Threshold	Who Can Approve	Escalation Path
Guest discount	Up to 10%	Duty Manager on shift	Above 10% → Owner
Refund	Up to MK 20,000	Duty Manager on shift	Above MK 20,000 → Owner
Routine restock purchase	Up to MK 50,000	Procurement lead	Above MK 50,000 → Owner
Staff sent home sick / schedule change	Same-day only	Supervisor on shift	Multi-day absence → Owner/HR

Your authority matrix

Decision Type	Threshold	Who Can Approve	Escalation Path

SHEET 05 / ROLES & RESPONSIBILITIES

05 Roles & Responsibilities

A short summary of what each role owns, so responsibility doesn't quietly default back to the founder by default rather than by design.

Role	Key Responsibilities	Escalates To
Owner / Founder	Sets strategy, approves above-threshold decisions, reviews this manual	

www.danby

SHEET 06 / REVIEW LOG

06 Review & Update Log

A manual nobody updates becomes fiction within a year. Log every change here, new suppliers, new policies, procedures that stopped working the way they were written, so the manual stays a true reflection of how the business runs.

Date	Section Updated	Updated By	Notes

www.da

APPENDIX / BLANK FORMS

Appendix - Extra Blank Forms

Photocopy or duplicate these pages as needed. Keeping spares at the back of the manual means a new SOP, handover entry, or decision rule can be added the moment it's needed, without waiting to "redo the whole document."

A. Blank SOP Form

SOP Title	
Trigger - when to use this	
Step-by-step instructions	
Responsible role	
Review frequency	

B. Blank Decision Rule Row

Decision Type	Threshold	Who Can Approve	Escalation Path

nby
www

NEED HELP IMPLEMENTING THIS?

This template gives you the structure. If you would like hands-on support adapting it to your specific operation or a full systems audit first, that's exactly what an Advisory Engagement or Growth Partner membership is built for.

Visit www.danbywell.com for current options, or request a quote directly, via whatsapp.