

Operations Manual Template - GENERAL

Introduction

- Letter from President/Owner
- Corporate Philosophy
- Mission, Vision & Values
- Company History & Timeline

Organization

- Industry Overview
- Description of Business
- Product & Services Description
- Critical Organization Contact Information
 - Bank Information
 - Corporate Attorney
 - Corporate Address
 - Public Relations Office
 - Federal Employer Identification Number
 - Certified Public Accounting Firm
 - Worker's Compensation Insurance Agent
 - General Liability Insurance Agent
 - Hazard Insurance Agent
- Succession Plan

Emergency Procedures

- In Case of Emergency Contacts
- Robbery, Theft and Vandalism
- Injury or Illness
- Fire or Natural Disaster
- Violent Customers
- MSDS Policy & Information
- Evacuation Procedures
- Alarms, Locks and Keys
- Municipal & Government Inspections

Operations Procedures

- Business Opening Procedures
- Business Closing Procedures
- Security Systems & Measures
- Housekeeping and Appearance Standards
- Employee Scheduling
- Duties and Checklists by Job
- Theft & Loss Prevention
- Transaction Procedures

Operations Manual Template - GENERAL

- Bank Deposits
- Handling Cash & Cash Drawers
- Credit Cards & Check Acceptance
- Return Policy
- NSF Check Return Policy
- Daily Manager Reporting
- Weekly & Monthly Sales & Goal Reporting

Manufacturing Procedures

- Production Scheduling
- Maintenance Operations
- Stores & Supplies
- Staffing
- Material Handling
- Shipping Operations
- Loading Docks & Yard Operations
- Safety
- Machine Operations
- Facility Operations & Maintenance
- Production Reporting

Inventory Management & Merchandising

- Approved Vendors
- Inventory Controls
- Min/Max Levels and Inventory Reordering
- Warehouse Procedures
- Product Pricing
- Sales and Promotion Guidelines
- Floor Plan & Displays

Human Resources

- Job Descriptions & Expectations
- Applications
- Interviews, Selection & Hiring
- EEO Policy
- Compensation & Bonus Structure
- Vacation Policy
- Employee Benefits
- Probationary Period
- Performance Reviews
- Harrasment & Discrimination Policy

Financial Management

- Daily Reports
- Monthly Reports
- Month End Closing Procedures
- Accounts Payable
- Accounts Receivable Management
- Financial Reporting Standards

Customer Service

- Returns & Exchanges
- Complaints
- Special Product or Service Orders
- General Product Knowledge
- Sales Principles
- Sales Associate Responsibilities to Customer
- Sales Associate Authority for Complaint Resolution

Advertising & Marketing

- Customer Analysis
- Current Market Analysis
- Budget
- Goals & Objectives
- Corporate Branding
- Time Frames
- Resource Needs
- Monitor, Measure & Testing
- Tactical Action Plans