SOP 1

Okay, so we're gonna get started. So, welcome to standard operating procedure manual workshop. Alright, and I just wanna let everyone know that the templates have been totally redone. So if you downloaded the templates prior for the first session, they're not the same. All right, so how do you get a hold of me? Right? That's my email. Not necessarily the best way to get hold of me, tag me in the group, if you have a question, that's probably the fastest way to get a hold of me. Okay. So the basic goal for today is to give you this, the tools and the skills to create your standard operating procedure manual. And I do want to caution you that this is a huge undertaking, okay, it is going to take you hours to do this to template, it's gonna just make your life easier. So I'm going to show you how to use it. Alright, the supplemental materials, the that QR code, they'll take you to where the templates are. All right. So we're gonna cover a couple of things, right now. All right, we're gonna go over some of the tools that I use to put this together. All right, how to use the template and Canva. Some of the other tools are cloudconvert, the Dobot, Google Drive and discuss some organizational tools, and then we'll get into the manual. All right, this particular this link here, this little QR code that I created, this goes directly to the eight, the Adobe PDF merge, alright, it is easiest way to find it. If you don't have the like the, the link that is like 4000 characters long is either this QR code or to do a Google search for Adobo PDF merge. So we're gonna stop this share and let's go over there. So or you could see what that is.

Okay, so here we have is Abode. PDF, Word, this is a free, okay. And what you would do if you need to combine, because this is a huge document, the only downside with Canva is that the, the templates can only be 100 pages long. And not even adding anything extra. The what I have for a template for you is like 200 pages long, okay? split out over three templates so that you can add or take away, alright, but if you want to put them together, this is how you do it, you would select the files, alright. So download them, make sure you know where they're at, select the files, it's going to have you select the files in the order that you want it. So first, second third, and then it'll merge it for you. So again, this is a free service.

Okay, the next issue, the only issue with Canva is is that you can't upload documents, you can't upload PDFs, okay? However, you can convert them to JPEGs, which you can upload to Canva. So whether it's a PDF or as a document, if you want to upload it and put it into your manual via Canva, then you need to convert that to an image. Okay? So either PDF or a document, either one, okay. And it just select files, it's going to tell you to upload the file and then you hit convert, and then you can download it.

The other one is Canva will be last. All right, because we're then we're going to be spending a lot of time on Canva. Okay. Google Drive is the next. Okay. So drive docs google.com. All right, you can create folders so if I want to either get all of these things are free. All right, you can opt for a paid version of it. But for this you don't need you don't need any of the of the paid options. I have paid because as you could see I have Wow, lots of folders there. Okay, but it's very easy. You hit click new, a new folder, name your folder or standard operating procedure create. And now you can upload anything to it. So if I want to new, if I want to upload a file or a folder, I just click which one and then I can upload it and it can be stored here.

Okay, so those are the tools outside of Canva. Okay. So let's head over to Canva. Okay. So the three links, again are also found on the website, right, so you could just click on them and we'll get to start going through them. Alright, guys, this seesaw, says hi.

So let's go over to Canva.

And again, this is i Well, I have the paid version, you do not need the paid version. All right, why I have the paid is I could have like hundreds of folders. You don't need hundreds folders unless you're using it for other purposes.

So for me it's located under workbooks.

And what you get is your own version of it. Okay, so whatever changes I make here on the master one, it's reflected in the link that's on the website. If you open it up and you create your own it doesn't reflect anything in my changes will not impact your copy of it. Okay, so my suggestion is is that once you have it make a copy of it alright so to make a topic

is pretty easy

All right, so here I have you go over to file and it says make a copy. Click Make a copy

July Weekend is probably not the best weekend. Okay, so now you'll see it says copy of Standard Operating Procedures Manual. Alright. You can then rename it if you like to take off the copy up. Okay. So, there's that. So I'm good ditch this is I don't need it. Alright. So here we have. So I'm going to show you how to use and how to edit in Canva. Okay, so these are all textboxes. Okay, this is my logo, do you want to put your logo in there, which I highly recommend you do. You just simply move it out of the way. Put your own up, right. And if you've made a mistake, and you want to change it, hit the back arrow. Okay. Hold on for one second. Okay, hopefully it's a little fire. Alright, this color here, you can change that color. I have a color palette that goes with my logo. So I wanted to change that to blue. Fine. Now you want to be careful with the change all because if you change all everything that is green will be blue. Okay, so don't recommend doing that. And I don't like now the color of this of the text. So we'll change the color of the text.

Here you go. Okay. Now some of them have photos,

these are frames.

Alright, so in order to put a photo up,

you click upload,

and you upload whatever photo you want. So let's just say for this one here

and put it over the frame, okay?

You're going to notice that there are bars now at the bottom, like these blue bars. Going down further, there's orangey tannish bars, all right. And that goes on the topic that we're talking about. So it's easier to flip on the bottom of the template to find what it is you want to do. Now, remember, the change all? So let's just say I don't like this particular orange, okay. And I want to make it a totally different orange. So that one, okay. Now, because this is a section, I would do change all. And everything that stack color that has to do with this section is now this color, this orange instead. Okay. If anybody has any questions on how to use any of the elements of Canvas, please do not hesitate to ask. Okay, so let's get started on the manual. Um, so this is your title page, right here. Alright, so you want to make sure that, you know, again, you have your logo, what it is, alright, I have left this page, the way it is, alright, I've these are all the categories that we discussed, I have not put in page numbers of the page numbers are here, but haven't changed them. Okay. You would come in here, and I highly recommend you put the table of contents and the correct page numbers. If you're not gonna be able to do this until you finish going through your manual. Okay, so we're gonna start off with the manual on we should talk about why this is so important. First off, okay. This manual, it gives value to your business, right? If you're going to sell it, it's going to make it easier for new owners to take over. This also sets expectations for employees and the clients alike. Okay. So there's no question about how you do things, everything is here. Okay. Um, like I said, this is a lot of work to this. Alright. So my recommendation is to schedule the time to do it. All right. So meaning, get your planner out your your schedule out, whatever you use, and write a time in it, that you're going to work on this. Alright, and stick to it. Okay, if you set chunks of time to do it is going to get done. Okay. And always remember that this is a living, breathing document. Okay? What's nice about doing it in a template form is that it makes it easy to update. So things change in your business. It's just coming in here, just making the changes. Alright. So you want to start off with your business, alright. And the photos that I would put here on your business, right? Is pictures of your actual business. Alright. So if you were shocked I would put pictures of your groomers or the front of your of the storefront maybe someone bathing someone talk with the client doesn't matter. All right. So and if you don't like the frames, watch this, where they're situated.

You can move on see

and see how those red lines in there and helps you to center them. Alright, so you have have on this page here, you want to put a description, your mission and your vision statements. Alright, so this is just a text box. Now you could have three text boxes here. So what I'm going to do is I'm going to make copies of this text box. Right? So right there, the little three dots right here, hit more

and duplicate, duplicate.

And then you just move the text box here okay, and all of this isn't a you can move this however you want. So, the description of your business is to talk about your business. Okay. And I'll use my mobile grooming business as an example right? Positively pretty mobile grooming to begin in 2002. Mobile grooming allowed me to have one on one time with my clients, then we offered a holistic in a holistic and relaxing atmosphere for all pets, while specializing in dogs and cats doesn't have to be anything long. Just what it is your business does. Okay? So if you offer holistic services, if you offer spa services, if you do boarding if you do retail, that goes under the description of your business. Okay. Then there's the mission and the vision statement. Mission Statement is basically what you do. And the vision is how you deliver it. Okay. What this does, it sets a guide for making decisions in your business. All right, is everything in alignment? Right? So for example, mission statement, right, my mission statement is providing one on one attention to

pets. Okay.

Alright, so any decision how I delivered that is in a relaxing atmosphere in my mobile grooming van. So any decision that is made on the business? Does it follow the mission and the vision statement? Okay. So just a focal point it helps to align your organization is is sure that everybody's working towards the same goal.

The owners of the business? Okay, I have three spots there. If you don't need the response, take them out. All right, you can then put more of a description here, right? So for me, owners are my business actually is me and my husband. So I wouldn't need third one. So you don't want the third one, just get rid of it, you know it that get rid of it? Right? You can move this down instead. These are all textboxes. So I would just

type, my name,

my address, my phone number or my email, right? Again, if done something I didn't want to do, I just click the back arrow until everything goes back to the way it was. Then there's your staff pages. And let's say you have more than three staff. Maybe you have nine staff. Okay, so we just now, again, this is why we don't number the pages. Now I'm going to add two more pages. Now I have nine staff and their name and their information. Okay. After their name, I will probably put through what it is that they do. All right. So it may be Karen is office manager. Maybe Joanne is a groomer, maybe Beth is a bather. Okay, so I'm gonna ditch these two pages. If I want to get rid of a page, just click the little garbage can gone. Okay. Then there's a chain of command. Okay, name and a contact and what it is that they are in charge of. All right. So as the owner, I would be up here on top. Okay, this row right here, might be office manager, might be head groomer, this one might be is this manager, alright? And if there's context underneath here, again, you don't want something, move it out of the way. Alright, but if somebody has a question, they know who to contact and what the chain of command is. So person down here can answer the question, then somebody up here may not know But then the people up here would be the ones to contact the person up here. Does that make sense? All right. So there's always a change of command. So you might start here, this person can help. They're gonna say, try this person right here, or they'll contact us and can help them it goes up the ladder here

next page here and again, you may need more than one page is the job descriptions. Alright, this will also go into the employee manual section of it. What is the job description? What does the groomer do? Alright, this the groomer, only groom dogs, are they responsible for cleaning? Are they whatever it is that is expected from each of the staff should be detailed here. Okay.

After that, now, these are important business operations. Again, you may need more than one, one of these here, passwords and logins. Now, here's the thing, I'm going to have you exercise caution, right now for my business, it's just me and my husband, the only people who are going to see this are me and my husband. So any passwords in any login is going to be fine to put here. You may not want to put sensitive information here, that can simply be a page you take out of, for example, I would put it here. But then when I went to print it, or make it available, I might remove that page. And so passwords and logins this would be for to operate the point of sales, to turn on the computer to turn on turn off the alarm system, whatever it is a password or a login, that people need to have in order to do their job should be here. Location of critical items, okay. That might be keys, or an extra set of keys. It could be or keys to a safety deposit box, or where is the safety deposit box? Any kind of documents that are important, there might be copies of inventory for things for insurance. Where's that stuff located? All right. So you have copies of your computer files, where are they? Right? Cloud Storage is great. But again, how does anyone access that? And records and record keeping rare? Do you keep that information? Are they digital? are they hard copies? Are they both? Where do you keep photos and videos? How long do you keep your records? And I would also put here, what makes a client current? under what circumstance? This is kind of considered a current client? Is it someone that's on a schedule? Is it someone that that you haven't seen in two years, and that's fine, but whatever your parameters are, that should be here.

Then after that becomes professional contacts, okay, and again, you may need more than one pages. And you don't have to put your photo here, you could put their logo up here. Okay? So who would be here, your landlord, all right, and so you don't have a picture a logo for the landlord. So let's go over the photos.

Type in landlord and here, put that photo in there. Okay.

And then all of your contact information. So you get landlord, your insurance company, utilities. Whoever provides electrical gas, your bank, your accountant, your lawyer, any outside staff like cleaning, cleaning company, maybe you have a towel service. Maybe you have a mechanic, whatever your professional contexts are. Good, there's only one page but I'm sure you'll be able to make a duplicate of it. Okay. Then after that comes your, your your vendors, right? Again, all you need is a picture of the logo. So, going back to my uploads, all right. I order from often groomers. Okay, you could throw their logo in there Same deal, name, address, phone number, email.

That

is that session section. Now we're going to run into a different color, okay? Because this is going to be more on business. Okay? So we have SWOT, right? This will also be part of your business plan. Okay? But what SWOT is all right and I highly recommend everybody do this. And it should be done on the bare minimum at least once a year. Okay. Um, you can do it more often, but anywhere between six months and once a year is a good timeframe. So what a SWOT analysis is, is that it takes a look at strengths s, weakness, W opportunities, O and T is threads. So this thread is anything you are good at. And their cause also can be done for multiple people. So the SWOT analysis for you, SWOT analysis for your office manager, SWOT analysis for your groomers, you can have separate of these, right? So what is any one person really good at, for let's say an example. So you have two groomers. One groomer is really is can do competition grooms, she can hand strip, alright, well, what she's not good at weakness is behavior and handling dogs that are hard to handle. Okay? Or maybe she can't groom dogs over 30 pounds. Okay, do you have another groomer her loves the big dogs can't do a show trim to save her life. But she's really good with the seniors and the large dogs strengths and weaknesses. All right. And as a business owner, you would want to make sure that you're giving the right dogs to the correct groomer. This also goes for yourself, what, as a business owner, are you really good at? And what are you not good at? And I guarantee you that between the strength and the weakness column, right? They're going to be equally matched, which is normal. All right. And a weakness is either something you don't want to do. Or you're not good at it. All right. So you want to turn that weakness into a strength. And the way you do that is for something you don't want to do, you hire out, okay? It's something you're not good at. Either you hire out, or you get the necessary skills to make that a strength. For example, one of my weaknesses is organization. My natural state of being is basically being in chaos.

I spread out.

And if I don't make sure that everything has it spot, things get forgotten, and organ and that left unaddressed will become a threat, a threat to my business, okay, so I need to deal with it. Because a weakness can either become a strength or a weakness become it can become a threat. And you need to know that's an because that literally can save your business. And opportunities. If you know what your strengths and weaknesses and your threats are. You'll know whether or not an opportunity is an opportunity for you. And whether or not you are prepared to take advantage of that. Okay. Also knowing your financial situation. Okay? It's a strength. Because if you don't, it's actually a weakness, and it could turn into a threat. But knowing your financial situation can tell you whether or not you're in a position to take advantage of an opportunity.

Okay. There should be

every every month whether it's you sit down by yourself or you sit with your employees, you should have a planner. You know what? I don't particularly care for this block here. So let me see what happens. Okay.

I mean, wait, I like that much better. Okay, it's too dark.

So anyway,

meeting planner, what is the topic? What time you meeting? Who is who was there? What was the agenda? And then any notes, okay. And you should have one of these every single month. Right? Does not have to actually be there are things that are going to be in your manual Those that are just the templates for what it is you need to do, you only need to have the last month in your business manual. After that you could pull it out do another one. However you still keep them to the side.

Okay

then after that some market analysis

there we go

see, this is why you gotta be careful with change all Okay, so, market analysis, right? You need to know who your clients are. Okay. So, you're doing a market analysis? All right. You can have different markets. All right, for example, going back to those two groomers, okay. One is a great show groomer, one is another as a as can handle larger loves behavior problems. Alright. When you're marketing, those are two different markets. Okay. So you say separate them. So let's just say you want to go after those breed, show trims, okay. So the market might be show trim clients. Okay. What are the demographics for that? What are the client's? Who do you who are you? Who are those clients? Right? Being Where might you might you find them? Okay, so dogs that are in show trim might be the breed clubs. Okay. I'm your veterinarians. Alright, what is the typical budget of such a client? And what are their needs in the motivation? Meaning? We are what we all do is we all give someone back a clean pack. Okay? That doesn't mean that's what the client needs or the client wants, okay? What they may want is a dog and a show trim, because that's a status symbol for them. Okay, so when you're doing a market analysis, and again, anything that you measure can be improved. So let's just say the first time you did this, you got mixed results, well then change things up. Obviously, that didn't work. And if going after that analysis is what you want, then keep doing

it. Okay.

So then the industry in the niche should be again, the show trims, your unique selling proposition that's often referred to USP. That what that means is what makes you special there. Okay. So in the case of the groomer, the show trimmers, maybe she's a competition grower. Okay. And then who your target market is

a competitor analysis. Okay. That's,

is there more than one here?

Yeah, I did three of them. All right.

Who are your competitors in your area? What is their product or their service? What makes them special USP. All right, take a look at what your competitors are doing and whether or not they're at this they are successful at it. So there's room to do three competitor analysis okay. We have products and services, and I've got two pages for this. Okay, so examples of products and services and I did put some pictures in here, but you can add your own pictures. You didn't like that one. Just click on it, add a photo over it. Alright, so let's do dog grooming. Now the difference between the paid and the free version is that paid version has a load of photos that you can pay for. Alright, so as indicated by the word proud. Alright, so sad and like that photo. I want to use that photo Oh, I'm just going to put that over there and use that one instead, I suggest you upload your own photos, put them here. So I have put a categories. Alright, if you don't need a categories and you don't need a categories, okay, we got grooming bathing cat grooming self wash, spa nail trims retail and daycare. And then the textbox would be what that service actually is. So what is grooming entail? What is bathing entail? Was cat grooming entail? Self washing have any of this you don't teach it? Okay, there's two pages here for up to eight services. But let's say you have 12 then you know what add another page

the list of inventory and equipment, okay. These are specifically should also be especially the equipment should be in your copies of this should be in a dry folder. All right, separated as inventory and equipment because you need to put an insurance claim you want to be able to get to these pages and by having a copies in your Drive folders, no matter where you are. All right, you have access to this information. So what is inventory? Inventory is products. Okay? That would be reusable stuff, shampoos, conditioners, spa products. Anything that is used has shelf life, ear cleaner, cotton balls, okay? Equipment is the hard stuff. That's your tables and dryers, you tubs, your cash register. Anything that is a physical item. Okay? If there's a serial number, put a serial number on it, and how would the value of it okay? And going back up to inventory. Besides the products and the quantity, you want to make sure that there's a date here, you want to use this current up before this particular date then we're going to go into some quick financials of the business. I mean, this is not a business plan. Okay. And I've broken it down into quarters. And for this year, you want to have three measurements. Okay. So this one might be sales. This one might be the number of new clients this might be the number of returning clients ascribe with it is and is there a percentage?

Plus

Plus or Minus Two this plus minus.

Okay, so this is a quick look at what was it? Where are these numbers going? Are they going up to going down? If they're going up? Good. If they're going down? Why are they going down? If you had in the first quarter any difficulties what are they

I spell difficulties Correct. Anyway

All right. What your income statement are. Um, say this is grooming say this is bathing. So this is nails? Okay. Separate them out. How much money did you make from them? Okay. The three things that are listed here and you may not need all the one is sales. One is interest, and the other one is game. Okay. You only need one of these, which is the sales revenue. Okay. And then compare them. Expense Tracker, this is what your expenses were for the first quarter and then we're going to go on to the second do the same thing. Second quarter. The difficulties, the income statement, Expense Tracker, the third quarter, same deal, fourth quarter and then the year at the end. Okay. So when you're starting the next year, you should have actually have the year end summary from the year before, so you could start comparing it. Okay. Now we're gonna move over into marketing itself. With that first section is, is just a quick look at your business. So marketing, this is the steps that you take to do anything related to marketing. So here are procedures for developing planning or placing ads. Okay? Who designs the ads? How are they submitted? Where are they going? How much money do you devote for this? Alright? For example, okay. The steps might be for procedures for developing, let's say, an Instagram ad. Okay. So step one would be who designed the ad? Okay. Where's the ad submitted? Is there an approval process for that? Who is in charge of placing actually putting the ad on Instagram? What are the steps to do that? Okay. What is the budget for it? And then how long will that ad run? Okay. Those are all the decisions that go along with, with developing or planning or placing the ad. So there's, everything is laid out, step by step. And this is where things get time consuming. Okay. However, do it one time, and you take the time to listen, you'll have to do it again. And there won't be any guesswork on what it is that needs to be done. Because you're listing the steps. I have a template for everything I do. Alright, the other day, I spent 45 minutes. And I put up a class or pet for a class. Along with all the backend information on our website, scheduled reminder emails, set up the payment automation, created the sales page and a sales post in 45 minutes. And it was because I knew all the steps and everything I created a template for it. Alright, so it was actually just physically the amount of time spent putting it where it needed to go. When I first put that information together probably took me a couple of hours. But that work is paid off tremendously with each class I put up. All it takes me 40 minute, five minutes, start to finish and ready to go. And then I don't have to deal with anything else.

Okay, that's ads.

What about social media? All right. What is the procedure? And how do you put up pictures on Facebook or Instagram? Or Tiktok or whatever? Each of them are alright, because they are different steps. So what is the procedure for that? Okay, who schedules that? Who decides? Who creates that? How do you get testimonials? Okay. Do you have permission for before and afters? All right, do you have to get permission? So if somebody is grooming, and you want to do a before and after? All right, what is the procedure for doing that? Right? Is there a waiver or release from your clients? Do you ask permission? Is that part of your terms of service? Were those procedures, right? What about staff highlights? How do you schedule all these who schedules this

now if you want to get a testimonial, all right, so you have a script for that. Okay?

And it should be something specific to what it is you're looking for. Alright, if you're promoting an add on, or targeting a specific niche, most clients don't know what you want it to say. Okay. Say bye might put up something like five stars, Mary is awesome. That's not a real testimonial, because it doesn't tell anyone why I should use you. Alright, so having a suggesting scripts or asking if they put an ad if they put a test. You have permission to edit it. Alright, so a better one. My big. I couldn't believe my luck when I found a groomer who can strip spell up. She knows she now looks as Awesome as a miniature Chanel is or should look that's really specific. Okay? Bella's constant scratching has ceased waking me up at night since the groomer is at whatever, started dressing her skin conditions in their wonderful spot. You see what a big difference between that is, besides five stars, Mary is awesome. Okay, so having suggested scripts specifically on what it is you want them to say? And if that's not possible, okay, simply asking them? Can I edit it? Right? Probably a good 75% of any of the testimonials you'll ever see from me are edited. All right, because again, they don't know necessarily what it is I want them to say. All right, I will edit it, send it back to them and go oh, yeah, that's what I wanted to say. That's awesome. All right. Do you do email marketing? All right. Are there procedures for that you have a newsletter. Now, I want to do a little thing here on legalities, as far as email marketing is concerned. All right, you cannot send out a mass email from your personal email with everybody see seed on it, that's actually against the law. Okay, and the United States that has the weakest laws, that is still illegal, okay. You're this free options. All right. And MailChimp is the only free option that is out there. Okay. So make sure that you follow the guidelines for whatever state or country you are in, actually is whatever country you are in, as far as the legalities are concerned, but you want to use a service on it. Okay, so whose job is it to set it up? What are the parameters? How often? What are the elements of this? Who does this? Okay?

Do you do print ads? All right. Sometimes the newspapers have, like 450 bucks, you could do one of those little business card ads in the newspaper. Right? Who does that? All right. Well, those value pack ads, again, whatever the procedure is to do it, step it out. Okay. And if there isn't a textbox someplace, you can add a text box, click texts. All right. The letters, they are too big. change him.

Continuing our marketing, who does the website updates? Who maintains the website? And what are the steps here the passwords need to be here? Who goes in? Now just I guess some some Google information. Google is the search engine, the more often you update your website, the more tells Google that it is an active website. Okay. There is also something called an SSL certificate. Many websites will automatically handle that for you. But you need to make certain of it. The SSL SSL certificate is what puts the little lock on the website. So if you look up here on the top, where it says canva.com. And you see the little lock there that says is this a secure site? The SSL stands for Secure Socket Layer. And it's basically saying that Canvas is who they say they are this is Canva. Okay. And sometimes if you go to someone's website, and it says run away, we think this site has been compromised. It's probably because the SSL certificate has expired and it needs to be updated. Okay, but

who's responsible for all of that?

Okay, so what is a value proposition? This is why people buy from you. Okay. So why are they buying from you? Okay, if your mobile is a convenience, right? If you're a shop, do you have something very specific there that sets you apart? Right? What makes you better? All right. What are the main points you saw? And when you're thinking what points you saw, you have to think not necessarily from the perspective of the pet, but the perspective of the owner. Okay, so for skin issues, from the perspective of the owner, it might be that pet smells terrible. It might be the pet sheds, it's How the problem was a pet impacts them. Okay. And again, what is your unique selling point? What sets you apart?

If you have a marketing plan, what channel is you would instead put Instagram Facebook again, you can make multiple copies of this. What is your tactic? Is it what is it costing you for one time what it would cost you on a monthly basis?

Okay

and then your weekly social media planner. All right, so what channel and Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday? What is the schedule? Okay, so for this, I would simply make copies. And so whatever the week is, and then what are your planning? Okay, so let's say Instagram, on Sunday, you're going to post, whatever it is, or you go put, if you don't post a whole lot, it could be all the channels that you have here. And then on Sunday, I post here, I post on Facebook, I post on the Instagram, and then I might do a tick tock here. And whatever your schedule is, all right. Then we're going to move on to sales, and then we will wrap it up after sales. Okay, so sales, we have this now in red. Okay. So we'll start off with some of your policies. Okay. Well, how do you accept payment? All right, is a cashier's check. Is it PayPal or Venmo? Or whatever you're trying to sell services? Is it stripe or square? What happens when somebody refuses payments? I like to answer this question right here for you guys. So if somebody refuses payment, right? Legally, you cannot hang on to their pet, because that's actually pets or property. And that's considered theft. However, you can call the non police line and say, you have a client here and they are refusing to pay. And you need to have before you call, what is the Criminal Code for theft of service in your state? So that's real simple. Criminal Code slash name, you state slash that service. Okay. And it should come up with the criminal code, you might have searched a little bit for it. So you have it handy. Because you cannot the Criminal Code for any given state is like values, values. All right? You seriously cannot expect every police officer to know every single criminal code on whether or not something that could possibly be considered civil matter. But that the service is a criminal matter. Okay. So know what that is. And you can let them the owner know that you will turn their pet over When the police arrive, so you're not hanging on to them. But you want the police involved in the return of the pet because of theft of service. Okay. So, generally what happens in a theft service, okay. When you call the police, if they're either gonna get way angrier, because they're gonna pay you. Okay? What happens with a bounced check or a chargeback on a credit card? What is the procedure for that? What's your refund policy?

Then we go on to your financial context, okay. So anybody that has to do with your finances, so this could be your accountant, your bank, your CPA, ever deals with money. The bookkeeper, that contact goes here. All right. So you'll see again, multiple places for this information. You want to make it so it's easy to find when you need it. And I put in a different type of list here, alright, say you like this list way better than then like these up here and you want to do a list. Okay?

Very simple. You copy it and you simply move it up to the right place

and you just rename it all right. I'll put marketing per day at procedures.

Getting back down here.

So sales, how do you accept payments? Okay? What happens when somebody gives them a you gives you a check? What are the procedures for that? What if someone's paying by credit card? What are the procedures for that? What if someone's paying by cash? What are the procedures for that? How is that logged in? All right? How do you operate whatever point of sale certain thing that you have for each of these payments?

Your actual point of sales? All right? Your card readers. All right, what are the steps to do that? What are the steps to use on whatever software you have? You want to list out the steps how it is done. When I first was in the workforce, I was 16 years old. And I worked for Macy's and this was the year that computerized cash registers came out, it was a brand new thing. Prior to that, it was the ones where you press down mechanical things and it opened up a drawer. All right. There were steps that needs to be taken. And they eventually found they needed to laminate the steps. Because things weren't going well. Let's just leave it at that. How do you fulfill orders? Okay? Meaning if you do retail, okay. For example, when I was mobile,

I did a little bit of retail.

Okay, so how did that work? All right, they would generally phone in there, when I set the appointment, they would, I would ask them what it is they wanted to order, then I would then write out an invoice for them right off the order, I would then take the order, put it into my mobile grooming van. All right. And then I can add that to the sale of the grooming. So I would have a total. So it was created invoice that had the grooming and whatever retail that I ordered. So there were steps that had to be followed to do that. Right? If a lot of the food that I did for retail was raw. Okay, so that meant the steps were put a note on my steering wheel, grab water from freezer, okay? Because if I didn't do that, I would forget the order. So whatever my steps were, whatever the steps are for your, your, your your staff, you need to make sure that they're listed step by step, right? And nothing is too stupid. Okay, it's how it gets done. It's how you do things. And so that the whole point of the one thing step by step is to just don't forget to do something.

You do invoices. How do you do that? How do you process refunds and exchanges? Do you redeem gift gift cards or gift certificates? How do you redeem them?

At the end of the day? How do you close out the cash register at the end of the day? What's the procedure for making deposits? How do you generate your sales reports? How do you input any financial information? All right. Even if it's going to a bookkeeper. What are the steps to get it to the bookkeeper? Alright,

that's actually the next one how to get financial info to a professional. Alright. And that's where we're gonna stop for today. And tomorrow, same time for the second session.