

Operations & SOPs

build systems that run without you — turn work trapped in someone's head into clear SOPs, checklists, training guides, and ai-ready operating instructions.

30

copy-paste prompts

7

chapters

01

of the professional set

build systems that run without you

every organization has important work trapped inside someone's head. that works until the person is unavailable, overwhelmed, promoted, or gone.

this pack helps you use ai to turn repeated work into clear SOPs, checklists, training guides, and simple ai-ready operating instructions.

this is not a book. this is a working pack. use it to find undocumented work, capture how it really happens, clean it into a usable process, train people on it, and keep improving it.

pick one process. do not try to document the entire organization at once. start with one messy, repeated task, and use the prompts in order.

one good process becomes one reliable system.

how to use this pack

every prompt in this pack follows the same shape, so you always know what you're looking at and exactly what to do with it.

EVERY PROMPT, THE SAME SHAPE

- **purpose** — what this prompt is for, in one line.
- **when to use it** — the real moment in the documentation process to reach for it.
- **copy & paste prompt** — the prompt itself — paste it in, fill the [brackets], send.
- **pro tips** — specific ways to get a sharper, more usable result.
- **example output** — a realistic sample, so you know what to expect back.
- **what's next** — the natural next prompt in the sequence.

fill in only the [brackets]. everything else is ready to use.

chatgpt, gemini & claude

any of these three will do solid work across this pack. here's where each tends to be strongest.

THE TOOL	SHINES AT	GOOD TO KNOW
chatgpt	fast drafts — FAQs, quizzes, announcement messages	broadly capable, a good default for most of this pack
claude	long structured documents — the full SOP, the AI knowledge base cleanup	stays coherent across long, detailed documents
gemini	quick synthesis of interview notes and transcripts	fast, and often already inside tools you use

the recommended workflow

here's the whole system on one line, straight from the pack itself. each section lives somewhere along it.



do not document everything. document the work that saves time, reduces risk, improves training, and keeps the organization moving.

CHAPTER 1 OF 7

Find the Work

before documenting anything, find the recurring, fragile, or repeatedly-asked-about work worth capturing.

- sop opportunity scanner
- knowledge risk finder
- repeated question audit
- process priority matrix

PROMPT 01

SOP Opportunity Scanner

PURPOSE

Identifies recurring work that should become documented.

WHEN TO USE IT

The same questions, approvals, tasks, or fixes keep showing up.

COPY & PASTE

SOP OPPORTUNITY SCANNER

I manage [department/team/program]. Help me identify recurring work that should become documented as SOPs.

Group the work into:

1. daily tasks
2. weekly tasks
3. monthly tasks
4. quarterly or seasonal tasks
5. tasks that only one person knows how to do
6. tasks that create delays, errors, or repeated questions

For each SOP opportunity, rate:

- impact
- risk if undocumented
- time savings
- ease of documentation
- recommended priority

Return the answer as a table and then recommend the first 3 SOPs we should build.

PRO TIPS

- Be honest about what's actually recurring, not what feels important in the moment.
- Add 'assume we're a small team with limited time' if capacity is genuinely tight — it changes the recommendations.
- Start with the top 3 it recommends, not the whole list — momentum matters more than completeness.

EXAMPLE OUTPUT

Daily tasks: ticket triage (high impact, low documentation ease). Tasks only one person knows: vendor invoice approval (high risk, recommended first). Priority: document vendor approval and ticket triage first — both are high-risk, high-frequency.

WHAT'S NEXT Once you know what's recurring, find where it's genuinely fragile — prompt 02, Knowledge Risk Finder.

PROMPT 02

Knowledge Risk Finder

PURPOSE

Finds fragile work that depends too heavily on one person.

WHEN TO USE IT

Before choosing what to document first, especially if a key person might leave, go on leave, or the team is scaling fast.

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KNOWLEDGE RISK FINDER

Help me identify single points of failure in our operations.

Here is what our team does:

[describe team responsibilities]

Identify:

- work only one person understands
- approvals that get stuck
- tools only one person knows how to use
- recurring questions people ask the same person
- work that would break during vacation, illness, resignation, or rapid growth

Rank the risks from highest to lowest and recommend which processes should become SOPs first.

PRO TIPS

- Be specific about what would actually break, not just what feels informally 'important.'
- Ask this again after any team change — new fragility appears every time someone's role shifts.
- Treat 'high risk, low documentation effort' items as the true first priority.

EXAMPLE OUTPUT

Single point of failure: only the ops lead knows how to run payroll corrections. Risk: would break entirely during any absence.
Recommendation: document this before anything else, even if it's less frequent than daily tasks.

WHAT'S NEXT Turn what people keep asking about into a real list — prompt 03, Repeated Question Audit.

PROMPT 03

Repeated Question Audit

PURPOSE

Turns repeated interruptions into documentation opportunities.

WHEN TO USE IT

When the same questions keep landing in your inbox or Slack, one at a time, with no central answer.

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REPEATED QUESTION AUDIT

Here are questions my team keeps asking:

[paste questions]

Turn these into a list of SOPs, checklists, FAQs, templates, or training guides we should create.

For each item, tell me:

- what document to create
- who would use it
- what problem it solves
- what information is needed to build it
- how urgent it is

PRO TIPS

- Paste actual questions people asked, not paraphrased ones — real wording surfaces real gaps.
- Group similar questions before pasting them in; it produces a cleaner, less repetitive output.
- Revisit this every quarter — new repeated questions are the clearest signal of what to document next.

EXAMPLE OUTPUT

Question: 'how do I request time off?'
Document to create: a one-page time-off request SOP. Who uses it: all staff. Urgency: high — asked at least weekly across departments.

WHAT'S NEXT With a real list building, decide what to build first — prompt 04, Process Priority Matrix.

PROMPT 04

Process Priority Matrix

PURPOSE

Helps you choose what to document first.

WHEN TO USE IT

When you have more candidate processes than time to document them all at once.

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PROCESS PRIORITY MATRIX

Help me prioritize these processes for documentation:

[paste list]

Score each process from 1 to 5 on:

- frequency
- business importance
- risk
- time saved
- training value
- customer/client impact

Create a priority ranking and recommend a 30-day SOP build plan.

PRO TIPS

- Score honestly rather than optimistically — an inflated risk score just delays the processes that need it most.
- Weight training value highly if your team has frequent turnover — it compounds fastest there.
- Commit to the 30-day plan it recommends rather than re-prioritizing every week.

EXAMPLE OUTPUT

Highest priority: client intake — high frequency, high customer impact, currently undocumented. 30-day plan: week 1 client intake, week 2 vendor onboarding, week 3 expense approvals, week 4 review and refine all three.

WHAT'S NEXT With priorities set, start actually capturing the first process — chapter 2, prompt 05, Process Interview Guide.

Capture the Process

get the process out of someone's head and into structured notes, accurately and without inventing gaps.

- process interview guide
- voice memo to sop notes
- messy notes to process map
- tool and permission capture

PROMPT 05

Process Interview Guide

PURPOSE

Creates questions for interviewing the person who knows the process.

WHEN TO USE IT

Before interviewing the person who currently holds a process in their head.

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PROCESS INTERVIEW GUIDE

Create an interview guide to capture the process for [process name].

The interview should uncover:

- when the process starts
- who starts it
- what information is needed
- what tools are used
- every major step
- decision points
- common mistakes
- exceptions
- approvals
- handoffs
- outputs
- success criteria
- what a new person would misunderstand

Format this as a practical interview script I can use with the process owner.

PRO TIPS

- Send the interview guide ahead of time so the process owner can think it through, not improvise live.
- Record the interview if possible — you'll always find you missed a detail on the first pass.
- Ask 'what would a new person misunderstand' explicitly — it's the question that surfaces the most hidden knowledge.

EXAMPLE OUTPUT

Sample question generated: 'walk me through what happens the moment a new client signs — what's the very first thing you do, and how do you know to do it?' Follow-up: 'what's a mistake a new person would likely make here?'

WHAT'S NEXT Take what comes out of that interview and structure it — prompt 06, Messy Notes to Process Map.

PROMPT 06

Messy Notes to Process Map

PURPOSE

Turns rough notes into a clear process map.

WHEN TO USE IT

Right after an interview or brain-dump, while the notes are still rough and unorganized.

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MESSY NOTES TO PROCESS MAP

Turn these messy notes into a clear process map:

[paste notes]

Organize the process into:

1. trigger
2. owner
3. inputs
4. tools
5. steps in order
6. decision points
7. exceptions
8. outputs
9. handoffs
10. success criteria

Also identify missing information I still need to confirm.

PRO TIPS

- Paste the notes exactly as taken — don't pre-clean them, the tool organizes better from raw input.
- Pay close attention to the 'missing information' section — that becomes your follow-up question list.
- Confirm every flagged gap with the process owner before building the full SOP.

EXAMPLE OUTPUT

Trigger identified: a new lead fills out the contact form. Missing information flagged: unclear who owns follow-up if the assigned rep is out — needs confirmation before this becomes a full SOP.

WHAT'S NEXT If you're working from a recording instead of notes, there's a version for that too — prompt 07, Voice Memo to SOP Notes.

PROMPT 07

Voice Memo to SOP Notes

PURPOSE

Cleans up a transcript or dictated explanation.

WHEN TO USE IT

When you have a recorded or transcribed explanation instead of written notes.

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VOICE MEMO TO SOP NOTES

I am pasting a rough transcript of someone explaining how they do a process.

Clean it into structured SOP notes.

Transcript:

[paste transcript]

Extract:

- purpose
- owner
- frequency
- trigger
- required inputs
- tools
- step-by-step process
- warnings
- exceptions
- common mistakes
- final output
- open questions

Do not invent missing facts. Mark anything unclear as [needs confirmation].

PRO TIPS

- Don't clean up the transcript yourself first — let the tool do that work; your rough version has more signal than you'd expect.
- Take the '[needs confirmation]' flags seriously — this is where accuracy is protected, not just guessed.
- Use this for capturing a departing employee's knowledge quickly, before it's lost entirely.

EXAMPLE OUTPUT

Transcript excerpt: 'so basically I just check the inbox first thing, and if there's anything marked urgent I deal with that before...'
 Extracted step: 'check inbox each morning; handle anything marked urgent first. [needs confirmation: what qualifies as urgent?]'

WHAT'S NEXT Once the process itself is captured, document what it actually requires to run — prompt 08, Tool and Permission Capture.

PROMPT 08

Tool and Permission Capture

PURPOSE

Documents the tools, logins, and access required.

WHEN TO USE IT

Before finalizing an SOP, so a new person isn't blocked by access they didn't know they needed.

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TOOL AND PERMISSION CAPTURE

For this process, identify every tool, account, file, form, folder, permission, login, approval, and data source required.

Process:

[paste process]

Return:

- required tools
- required permissions
- files or templates needed
- where information comes from
- where completed work is stored
- access risks
- setup checklist for a new team member

PRO TIPS

- Include every login and permission, even ones that feel obvious to current staff — they aren't obvious to someone new.
- Flag access risks explicitly — a process depending on one person's personal login is a real risk worth naming.
- Use the output directly as a new-hire setup checklist, not just internal documentation.

EXAMPLE OUTPUT

Required tools: CRM (admin access), shared drive (edit access to /invoices), approval software. Access risk flagged: the vendor portal login is currently tied to one employee's personal email — recommend a shared team login.

WHAT'S NEXT With the process captured and its requirements clear, build the real thing — chapter 3, prompt 09, Full SOP Builder.

Build the SOP

turn captured notes into a real, structured SOP — and the quick-reference formats people actually use.

- full sop builder
- one-page sop
- checklist builder
- decision tree builder
- raci builder
- escalation matrix

PROMPT 09

Full SOP Builder

PURPOSE

Creates a complete SOP from your notes.

WHEN TO USE IT

Once you have real notes, an interview, or a cleaned transcript ready to become a formal document.

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FULL SOP BUILDER

Build a complete SOP for this process:

[paste process notes]

Use this structure:

1. SOP title
2. purpose
3. scope
4. owner
5. backup owner
6. users
7. frequency
8. trigger
9. inputs
10. tools and access
11. step-by-step procedure
12. decision points
13. exceptions
14. escalation path
15. outputs
16. quality standards
17. success metrics
18. related documents
19. review schedule
20. revision history

Write it clearly enough that a capable new team member could follow it without asking the process owner.

PRO TIPS

- Paste everything you've captured so far, even if it feels messy — more raw material produces a more complete SOP.
- Review the draft with the actual process owner before treating it as final — they'll catch anything AI inferred incorrectly.

EXAMPLE OUTPUT

SOP title: Client Intake Process. Owner: Sales Coordinator. Backup owner: Sales Manager. Trigger: signed contract received. Step 3: 'Send welcome email using template X within 24 hours of signature.' Escalation path: if

- Don't skip the 'review schedule' and 'revision history' sections — they're what keeps this from going stale.

contract terms are unclear, escalate to Sales Manager before proceeding.

WHAT'S NEXT Once it exists in full, build the version people will actually use day-to-day — prompt 10, One-Page SOP.

PROMPT 10

One-Page SOP

PURPOSE

Condenses a long SOP into a practical quick-reference version.

WHEN TO USE IT

After the full SOP is built, so there's a fast-reference version for daily use.

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ONE-PAGE SOP

Turn this SOP into a one-page version.

SOP:

[paste SOP]

Include:

- purpose
- who uses it
- when to use it
- required inputs
- 7 to 12 main steps
- key warnings
- escalation contact
- definition of done

Make it skimmable and practical.

PRO TIPS

- 7-12 steps is the right density — fewer feels incomplete, more defeats the purpose of a quick reference.
- Keep this version somewhere more visible than the full SOP — pinned in a channel, printed, or bookmarked.
- Update it every time the full SOP changes; a stale quick-reference is worse than none.

EXAMPLE OUTPUT

Purpose: process new client contracts within 24 hours. Steps (8): 1. confirm signature received 2. log in CRM 3. send welcome email 4. schedule kickoff call... Escalation: unclear contract terms → Sales Manager.

WHAT'S NEXT Turn the same content into something even more actionable — prompt 11, Checklist Builder.

PROMPT 11

Checklist Builder

PURPOSE

Turns the SOP into a step-by-step checklist.

WHEN TO USE IT

When people need to physically check off steps while doing the work, not just read about it.

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CHECKLIST BUILDER

Turn this SOP into an operational checklist.

SOP:

[paste SOP]

Create:

- pre-work checklist
- step-by-step doing checklist
- review checklist
- completion checklist
- common errors checklist

Use checkbox formatting.

PRO TIPS

- Print or pin the checklist somewhere it'll actually be used during the task, not just filed away.
- The 'common errors' checklist is often the most valuable section — review it after every use, not just once.
- Keep checkboxes short enough to glance at mid-task without breaking focus.

EXAMPLE OUTPUT

Pre-work checklist: confirm signed contract received CRM access confirmed. Doing checklist: create CRM record send welcome email schedule kickoff. Common errors: welcome email sent to wrong contact.

WHAT'S NEXT For processes with real forks in the road, add explicit decision logic — prompt 12, Decision Tree Builder.

PROMPT 12

Decision Tree Builder

PURPOSE

Clarifies what to do when different situations arise.

WHEN TO USE IT

When a process has genuine branching — different situations that call for different actions.

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DECISION TREE BUILDER

Create a decision tree for this process:

[paste process or SOP]

Identify:

- major decision points
- what question should be asked at each point
- possible answers
- what action to take for each answer
- when to escalate
- when to stop the process

Format it as a simple text-based decision tree.

PRO TIPS

- Focus on the decision points people actually get stuck on, not every theoretical fork.
- Keep each branch's action concrete — 'escalate' isn't useful without saying to whom and how.
- Test the tree against a real recent situation to confirm it actually resolves correctly.

EXAMPLE OUTPUT

Decision point: is the contract value over \$10k? Yes → requires manager approval before proceeding. No → proceed directly to welcome email. Escalate if: contract terms deviate from standard template.

WHAT'S NEXT Make ownership at each step explicit — prompt 13, RACI Builder.

PROMPT 13

RACI Builder

PURPOSE

Clarifies roles and ownership.

WHEN TO USE IT

When it's unclear who's actually responsible for a step, or approvals keep stalling waiting on the wrong person.

COPY & PASTE**RACI BUILDER**

Create a RACI chart for this process:

[paste process]

Roles involved:

[list roles, or say "infer likely roles"]

For each major step, identify who is:

- Responsible
- Accountable
- Consulted
- Informed

Also flag any unclear ownership or risky handoffs.

PRO TIPS

- Name real people or roles, not just departments — 'operations' isn't accountable, a specific role is.
- Pay attention to steps with more than one 'Responsible' — that's usually where confusion starts.
- Revisit this any time a role changes on the team; stale RACI charts cause the exact confusion they're meant to prevent.

EXAMPLE OUTPUT

Step: send welcome email. Responsible: Sales Coordinator. Accountable: Sales Manager. Consulted: none. Informed: Account Manager. Flag: contract approval step has no clearly Accountable role — recommend assigning one.

WHAT'S NEXT For when things go wrong specifically, build the response path — prompt 14, Escalation Matrix.

PROMPT 14

Escalation Matrix

PURPOSE

Documents who to contact when something goes wrong.

WHEN TO USE IT

Before an SOP goes live, so people know exactly what to do when something doesn't go as planned.

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ESCALATION MATRIX

Create an escalation matrix for this SOP:

[paste SOP]

Include:

- issue type
- severity level
- first action
- who handles it
- when to escalate
- who it escalates to
- expected response time
- documentation required

PRO TIPS

- Define severity levels concretely — 'urgent' means nothing without a real definition attached.
- Include expected response times; an escalation path without a timeframe often just gets ignored.
- Test it with a real past incident to confirm the right person would actually have been contacted.

EXAMPLE OUTPUT

Issue type: contract terms unclear. Severity: medium. First action: pause processing, flag to Sales Manager. Expected response time: same business day. Documentation required: note the ambiguity in the CRM record.

WHAT'S NEXT With the SOP structurally complete, start pressure-testing it — chapter 4, prompt 15, Gap Finder.

Improve the SOP

pressure-test the SOP before it goes live — gaps, edge cases, bottlenecks, quality, and risk.

- gap finder
- edge case hunter
- bottleneck finder
- quality control review
- compliance and risk review

PROMPT 15

Gap Finder

PURPOSE

Finds missing information before the SOP goes live.

WHEN TO USE IT

Before an SOP goes live, as a final check for what's missing.

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GAP FINDER

Review this SOP as an operations manager.

SOP:

[paste SOP]

Identify:

- missing steps
- unclear instructions
- vague ownership
- missing inputs
- missing outputs
- undefined success criteria
- tool or access gaps
- training gaps
- places where a new employee may get stuck

Then rewrite the SOP with improvements.

PRO TIPS

- Review as if you've never seen the process before — familiarity hides gaps from the original author.
- Take 'places a new employee may get stuck' seriously; it's often the most revealing section.
- Don't just read the gap list — use the rewritten version it produces as your actual next draft.

EXAMPLE OUTPUT

Gap found: no defined output for what 'complete' looks like at the final step. Unclear ownership: escalation contact listed as 'manager' without naming which manager. Rewritten section added: an explicit 'definition of done' at the end of the procedure.

WHAT'S NEXT Once the obvious gaps are fixed, stress-test it against unusual situations — prompt 16, Edge Case Hunter.

PROMPT 16

Edge Case Hunter

PURPOSE

Stress-tests the SOP.

WHEN TO USE IT

After the main gaps are fixed, before treating the SOP as truly complete.

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EDGE CASE HUNTER

Review this SOP and identify edge cases.

SOP:

[paste SOP]

Find:

- unusual situations
- failure points
- customer/client exceptions
- missing approvals
- data risks
- compliance risks
- timing problems
- handoff problems
- tool failures
- human errors

Then add an "exceptions and edge cases" section to the SOP.

PRO TIPS

- Think about the situation that happened once, six months ago, that nobody wrote down how to handle.
- Compliance and data risks are easy to overlook in an operational SOP — this prompt catches them deliberately.
- Add the edge cases as their own section rather than scattering them through the main steps.

EXAMPLE OUTPUT

Edge case found: what happens if the client signs but payment fails? Not currently covered. Added section: 'Exceptions — if payment fails after signature, pause onboarding and escalate to Finance before sending welcome materials.'

WHAT'S NEXT With exceptions covered, look for what's just plain slow — prompt 17, Bottleneck Finder.

PROMPT 17

Bottleneck Finder

PURPOSE

Finds slow points and unnecessary work.

WHEN TO USE IT

When a process technically works but feels slower or more painful than it should.

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BOTTLENECK FINDER

Review this process for bottlenecks and inefficiencies:

[paste process]

Identify:

- steps that slow things down
- duplicate work
- unnecessary approvals
- unclear handoffs
- preventable errors
- manual work that could be automated
- steps that do not add value

Recommend practical improvements that a small team can implement.

PRO TIPS

- Paste the process as it actually runs today, warts and all — sanitized descriptions hide the real bottlenecks.
- Prioritize fixes a small team can actually implement — not every inefficiency needs a big system change.
- Revisit this after any bottleneck fix; solving one often reveals the next one downstream.

EXAMPLE OUTPUT

Bottleneck found: contract approval requires a manager's manual sign-off even for standard, pre-approved terms. Recommendation: pre-approve standard terms up to \$5k, reserving manual approval for exceptions only — cuts average processing time significantly.

WHAT'S NEXT Now formalize what 'good' actually looks like — prompt 18, Quality Control Review.

PROMPT 18

Quality Control Review

PURPOSE

Adds standards and review criteria.

WHEN TO USE IT

Once the process runs smoothly, to make sure quality stays consistent as more people run it.

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QUALITY CONTROL REVIEW

Add a quality control section to this SOP:
[paste SOP]

Include:

- quality standards
- review steps
- signs the work is complete
- signs the work is not ready
- common mistakes
- how to correct mistakes
- who approves final work
- metrics to monitor

PRO TIPS

- Define 'not ready' as concretely as 'complete' — both directions matter for a real quality check.
- Name who actually approves final work; an unnamed approver becomes a bottleneck of its own.
- Pair this with the escalation matrix so quality issues have a clear next step, not just a flag.

EXAMPLE OUTPUT

Quality standard: welcome email sent within 24 hours, using the current template, with no placeholder text left unfilled. Common mistake: placeholder [Client Name] left in the email. Correction: resend corrected version, log the error for the quarterly review.

WHAT'S NEXT Before rollout, check for risk you might have missed — prompt 19, Compliance and Risk Review.

PROMPT 19

Compliance and Risk Review

PURPOSE

Adds operational risk awareness.

WHEN TO USE IT

Before rolling out an SOP that touches customer data, money, safety, or legal exposure.

COPY & PASTE

COMPLIANCE AND RISK REVIEW

Review this SOP for compliance, privacy, safety, financial, customer, legal, and reputational risks.

SOP:

[paste SOP]

Flag:

- risks
- severity
- likelihood
- prevention steps
- required approvals
- documentation needed
- when to escalate

Do not provide legal advice. Focus on operational risk controls.

PRO TIPS

- Take this seriously even for processes that feel routine — routine is exactly where risk hides unnoticed.
- Remember this flags operational risk, not legal advice — loop in an actual advisor for anything flagged as legally significant.
- Prioritize fixing anything flagged as high severity and high likelihood before rollout, not after.

EXAMPLE OUTPUT

Risk flagged: client payment information is referenced in the SOP without a note on data handling. Severity: high. Prevention step: add explicit instruction to never store card details outside the approved payment processor.

WHAT'S NEXT With the SOP solid and safe, prepare to teach it — chapter 5, prompt 20, New Employee Training Version.

Train the Team

turn the finished SOP into real training material a new person can actually learn from.

- new employee training version
- sop faq generator
- manager coaching guide
- scenario practice builder

PROMPT 20

New Employee Training Version

PURPOSE

Turns the SOP into onboarding material.

WHEN TO USE IT

Once the SOP is finalized, before using it to train someone new.

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NEW EMPLOYEE TRAINING VERSION

Turn this SOP into a training guide for a new employee.

SOP:

[paste SOP]

Include:

- plain-English overview
- why the process matters
- key terms
- tools used
- step-by-step training explanation
- common mistakes
- practice exercise
- quiz questions
- manager review checklist

PRO TIPS

- The plain-English overview matters more than it seems — jumping straight to steps loses people who need the 'why' first.
- Actually use the practice exercise, don't skip straight to live work — it's where real understanding shows up.
- Keep the quiz short; its purpose is confirming understanding, not testing memorization.

EXAMPLE OUTPUT

Plain-English overview: 'Every time someone signs a contract, we need to welcome them properly and get them set up — this is how we make sure that happens the same way every time.' Quiz question: 'what's the first thing you do when a contract is signed?'

WHAT'S NEXT Give managers the tools to actually teach it well — prompt 21, Manager Coaching Guide.

PROMPT 21

Manager Coaching Guide

PURPOSE

Helps a manager teach the process.

WHEN TO USE IT

Before a manager sits down to train someone on this specific process.

COPY & PASTE

MANAGER COACHING GUIDE

Create a manager coaching guide for teaching this SOP:

[paste SOP]

Include:

- what to explain first
- what to demonstrate
- what the employee should practice
- questions to ask the employee
- signs they understand
- signs they need support
- 30-minute training agenda

PRO TIPS

- Use the 30-minute agenda as a real structure, not just a suggestion — unstructured training sessions run long and cover less.
- The 'signs they need support' section is what tells a manager when to slow down — don't skip past it.
- Have the manager ask the suggested questions rather than just demonstrating and hoping it lands.

EXAMPLE OUTPUT

What to demonstrate first: run through one complete client intake live, narrating each decision. Signs they understand: they can explain back why a step matters, not just what it is. 30-min agenda: 10 min overview, 15 min demo, 5 min questions.

WHAT'S NEXT Anticipate the questions before they're asked — prompt 22, SOP FAQ Generator.

PROMPT 22

SOP FAQ Generator

PURPOSE

Creates an FAQ from the SOP.

WHEN TO USE IT

Once the SOP and training exist, to handle common questions without repeated interruptions.

COPY & PASTE

SOP FAQ GENERATOR

Create an FAQ for this SOP:

[paste SOP]

Include questions a new employee, manager, client, customer, or partner might ask.

Group the FAQ by:

- getting started
- tools and access
- process steps
- exceptions
- approvals
- mistakes
- escalation

PRO TIPS

- Group by theme as suggested — a flat list of questions is harder to scan than a categorized one.
- Update this FAQ every time a genuinely new question comes up that isn't already covered.
- Share it alongside the SOP itself, not as a separate, easy-to-forget document.

EXAMPLE OUTPUT

Getting started: 'where do I find the contract once it's signed?' Exceptions: 'what if the client wants to change terms after signing?' Escalation: 'who do I contact if the CRM is down?'

WHAT'S NEXT Give trainees a chance to practice before real stakes are involved — prompt 23, Scenario Practice Builder.

PROMPT 23

Scenario Practice Builder

PURPOSE

Creates practice cases for training.

WHEN TO USE IT

After initial training, before someone runs the process live and unsupervised.

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SCENARIO PRACTICE BUILDER

Create 5 realistic training scenarios for this SOP:
[paste SOP]

For each scenario, include:

- situation
- what the trainee must decide
- correct action
- why it matters
- common wrong answer
- manager discussion question

PRO TIPS

- Base scenarios on situations that have genuinely happened before, not hypothetical extremes.
- Discuss the 'common wrong answer' explicitly — naming the mistake up front helps people avoid it.
- Run these as a live discussion with a manager, not just a written worksheet completed alone.

EXAMPLE OUTPUT

Scenario: a client asks to change contract terms the day after signing. Correct action: pause processing, escalate to Sales Manager before making any changes. Common wrong answer: agreeing to the change directly without escalation.

WHAT'S NEXT With training solid, prepare to actually launch the SOP — chapter 6, prompt 24, Rollout Plan.

Deploy the SOP

launch it properly, give it a real home, and keep it from going stale.

- rollout plan
- team announcement draft
- sop storage system
- quarterly sop review

PROMPT 24

Rollout Plan

PURPOSE

Creates a simple launch plan.

WHEN TO USE IT

Once an SOP is built, tested, and ready to become how the team actually works.

COPY & PASTE

ROLLOUT PLAN

Create a rollout plan for this SOP:

[paste SOP]

Include:

- who needs to know
- what changes for each group
- announcement message
- training plan
- adoption checklist
- risks to rollout
- first-week support plan
- 30-day review plan

PRO TIPS

- Name who needs to know explicitly — a rollout that misses a stakeholder creates confusion fast.
- Build in a first-week support plan; the first few real uses often surface small issues worth catching early.
- Set the 30-day review date now, not as an afterthought once the SOP is already in use.

EXAMPLE OUTPUT

Who needs to know: sales team, sales manager, finance (for the approval step). First-week support: the process owner is available for questions via a dedicated Slack channel. 30-day review: scheduled for [date], to check for real-world friction.

WHAT'S NEXT Write the message that actually introduces it — prompt 25, Team Announcement Draft.

PROMPT 25

Team Announcement Draft

PURPOSE

Writes the internal announcement.

WHEN TO USE IT

Right before an SOP goes live, to tell the team clearly what's changing.

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TEAM ANNOUNCEMENT DRAFT

Draft a clear internal message announcing this new SOP.

SOP summary:

[paste summary]

Audience:

[team/audience]

Include:

- why this SOP exists
- what is changing
- when it starts
- where to find it
- what people should do next
- who to contact with questions

Keep the tone practical and respectful.

PRO TIPS

- Explain why the SOP exists, not just what it requires — people follow process better when they understand the reason.
- Keep it short; a long announcement about a new process often gets skimmed, not read.
- Name a specific contact for questions, not just 'reach out if you have questions.'

EXAMPLE OUTPUT

'Starting [date], all new client contracts will follow a new intake SOP. This replaces the informal process we've been using and should cut onboarding delays significantly. Find it at [location]. Questions go to [name].'

WHAT'S NEXT Give the SOP a real home once it's live — prompt 26, SOP Storage System.

PROMPT 26

SOP Storage System

PURPOSE

Creates a simple documentation structure.

WHEN TO USE IT

Once you have more than a couple of SOPs, before they become scattered across random documents.

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SOP STORAGE SYSTEM

Help me design a simple SOP storage system for our organization.

Context:

[describe organization/team/tools]

Recommend:

- folder structure
- file naming convention
- SOP owner system
- review schedule
- version control method
- approval status labels
- archive rules
- how employees should find SOPs quickly

PRO TIPS

- Keep the folder structure shallow — deeply nested folders make SOPs harder to find, not easier.
- Include a clear naming convention from day one; retrofitting names later is far more work.
- Assign an owner for the storage system itself, not just for individual SOPs.

EXAMPLE OUTPUT

Folder structure: /SOPs/[department]/[process-name]. Naming convention: SOP-[department]-[process]-v[number]. Review schedule: quarterly, owned by the ops lead. Approval status labels: draft, active, under review, retired.

WHAT'S NEXT With storage in place, make sure SOPs don't go stale — prompt 27, Quarterly SOP Review.

PROMPT 27

Quarterly SOP Review

PURPOSE

Keeps SOPs current.

WHEN TO USE IT

Every quarter, for every active SOP, as a standing habit.

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QUARTERLY SOP REVIEW

Review this SOP for quarterly updates.

SOP:

[paste SOP]

Ask:

- what has changed?
- are the tools still accurate?
- are the owners still correct?
- are steps missing?
- are steps outdated?
- what errors happened recently?
- what questions did employees ask?
- what should be simplified?

Return an updated SOP and a change log.

PRO TIPS

- Ask real employees what confused them since the last review — that's more revealing than reviewing the document alone.
- Keep the change log, not just the updated SOP — it shows what changed and why for anyone who asks later.
- Schedule this on a calendar, not as a 'someday' task — it's the review that keeps every other prompt's output current.

EXAMPLE OUTPUT

Change identified: the CRM tool referenced was replaced two months ago. Updated SOP: all CRM references updated to the new tool name and login process. Change log: 'v3 — updated tool references, added exception for delayed payment (see prompt 16).'

WHAT'S NEXT Once the core system is solid, consider extending it with ai support — chapter 7, prompt 28, AI Assistant Instructions.

Turn the SOP Into AI Support

the optional final step — let an ai assistant help people use the process day to day.

- ai assistant instructions
- ai assistant test questions
- ai knowledge base cleanup

PROMPT 28

AI Assistant Instructions

PURPOSE

Turns the SOP into instructions for a custom AI assistant.

WHEN TO USE IT

Once an SOP is mature and stable, if you want an ai assistant to help people use it day-to-day.

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AI ASSISTANT INSTRUCTIONS

Turn this SOP into system instructions for an internal AI assistant.

SOP:

[paste SOP]

The AI assistant should:

- answer questions about the process
- guide employees step by step
- ask clarifying questions when needed
- avoid inventing policies
- tell users when to escalate
- cite the relevant SOP section when possible
- keep answers practical and concise

Create:

1. assistant role
2. allowed tasks
3. prohibited tasks
4. escalation rules
5. answer style
6. knowledge base instructions
7. sample user questions and ideal answers

PRO TIPS

- Be explicit about prohibited tasks — an assistant that invents policy when unsure causes more harm than one that escalates.
- Keep the answer style concrete — 'practical and concise' should be defined with an example, not left abstract.
- Test the sample questions yourself before deploying — if the ideal answers feel off, refine the instructions first.

EXAMPLE OUTPUT

Allowed tasks: answer process questions, guide step by step. Prohibited tasks: approve exceptions, waive requirements. Escalation rule: any question about contract value over \$10k routes to a human. Sample question: 'can I skip the welcome email?' Ideal answer: 'no — it's a required step; if there's a reason to skip it, escalate to your manager.'

WHAT'S NEXT Before that assistant goes live, clean up what it's actually trained on — prompt 29, AI Knowledge Base Cleanup.

PROMPT 29

AI Knowledge Base Cleanup

PURPOSE

Prepares SOPs for uploading into an AI tool.

WHEN TO USE IT

Before uploading an SOP into any ai tool as reference material.

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AI KNOWLEDGE BASE CLEANUP

Clean this SOP so it can be used as knowledge base content for an AI assistant.

SOP:

[paste SOP]

Make it:

- clearly titled
- sectioned with headers
- free of contradictions
- explicit about ownership
- clear about escalation
- easy for AI to retrieve
- written in direct language

Do not remove important operational detail.

PRO TIPS

- Contradictions between documents are the most common cause of a confused ai assistant — resolve them before uploading.
- Keep the operational detail intact even while simplifying language; over-trimming loses exactly what the assistant needs.
- Re-run this cleanup any time the underlying SOP changes, not just once at setup.

EXAMPLE OUTPUT

Before: ownership implied across three different paragraphs. After: a single explicit 'Owner: Sales Coordinator' line near the top. Contradiction resolved: one section said escalate to 'manager,' another said 'team lead' — standardized to one role throughout.

WHAT'S NEXT Confirm the assistant actually works before relying on it — prompt 30, AI Assistant Test Questions.

PROMPT 30

AI Assistant Test Questions

PURPOSE

Tests whether the AI can actually support the process.

WHEN TO USE IT

Right after setting up an ai assistant on this SOP, before trusting it with real users.

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AI ASSISTANT TEST QUESTIONS

Create a test set for an AI assistant trained on this SOP:

[paste SOP]

Create:

- 10 common user questions
- 5 edge case questions
- 5 questions the AI should not answer directly
- correct answer guidelines
- escalation triggers
- scoring criteria for answer quality

PRO TIPS

- Include questions you genuinely expect the assistant to get wrong — that's where the real testing value is.
- Pay close attention to the 'should not answer directly' questions; a wrong answer there is the highest-risk failure mode.
- Re-run this test any time the underlying SOP or the assistant's instructions change.

EXAMPLE OUTPUT

Edge case question: 'the client wants to sign but hasn't paid the deposit — what do I do?'

Correct behavior: the assistant should flag this as an exception requiring escalation, not attempt to resolve it directly. Scoring: full credit only if it explicitly escalates rather than guessing.

WHAT'S NEXT This closes the loop — you now have a documented, trained, and tested process running with less dependence on any one person.

TEMPLATES & WORKSHEETS

fill these in once

the reusable references that hold the system together.
keep these current and every prompt in this pack gets sharper.

standard sop template

the living reference this whole system pulls from. update it as the team changes.

NAME / ROLE	CORE RESPONSIBILITIES
WORKING STYLE	STRENGTHS
COMMON FRICTION POINTS	DECISION RIGHTS

the review calendar

a calm year at a glance. write the review, check-in, or milestone you're targeting each quarter.

QUARTER ONE	QUARTER TWO
QUARTER THREE	QUARTER FOUR

BONUS

keep these close

the reference material built directly into this pack — starter ideas, an implementation plan, and a way to check any SOP before it launches.

10 starter SOPs every organization should have

if you're not sure where to start, one of these is almost always worth documenting first.

- | | |
|--|---|
| ☐ employee onboarding | ☐ weekly reporting |
| ☐ employee offboarding | ☐ meeting preparation and follow-up |
| ☐ client or customer intake | ☐ customer complaint handling |
| ☐ expense approvals | ☐ file naming and storage |
| ☐ vendor onboarding | ☐ password, tools, and access requests |

the 30-day implementation plan

exactly how to move from nothing to a trained, deployed SOP in one month.

week 1 — find and choose

run prompts 1 and 2, choose 3 SOPs, pick one to build first.

week 2 — capture

interview the process owner, use prompts 5, 6, 7, and 8, confirm missing details.

week 3 — build and improve

use prompt 9 to build the full SOP, prompts 15, 16, 18, and 19 to improve it, prompt 11 for a checklist.

week 4 — train and deploy

use prompts 20, 21, 24, and 25, store the SOP properly, schedule a quarterly review, optionally add AI support with prompts 28-30.

the sop quality scorecard

run this before treating any SOP as ready to launch. score each honestly.

- | | |
|--|--|
| ☐ are the steps complete? | ☐ is escalation clear? |
| ☐ are tools and permissions listed? | ☐ could a new employee use this? |
| ☐ are decision points clear? | ☐ are quality standards included? |
| ☐ are exceptions covered? | ☐ is the review date current? |

do not document everything

a closing reminder, straight from the pack.

document the work that saves time
not everything needs an SOP — recurring, high-risk,
or frequently-asked-about work does.

start with one process
make it clear, use it, improve it. then build the next
one.

one good process becomes one system
and one system, repeated, becomes an organization
that runs without any single person holding it all in
their head.

WHEN YOU REACH THE LAST PAGE

you have a working system

- ✓ a documented, tested SOP for at least one real process
- ✓ checklists, decision trees, and an escalation matrix
- ✓ training material a new hire could actually learn from
- ✓ a rollout plan and a real home for your documentation
- ✓ a quarterly review habit that keeps it all current
- ✓ an optional AI assistant trained on your own process

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