

Operations Manual Template

How to use this manual to develop your own franchise

About this manual

In the following guide you will find the foundational building blocks necessary to create an operations manual for your company. A well-written operations manual enables your franchise branches to represent your brand consistently and profitably. It also provides a great opportunity to clearly define your business operations. While every successful business has a general idea of their operations, few know their business at the level of detail the operations manual demands. By investing the necessary time and resources to complete this manual, not only will you be on your way to franchising, your existing business will benefit greatly as well.

The importance of developing Standard Operating Procedures

As you read through this manual, you will begin to understand the importance of developing a set of standard operating procedures (SOPs). A key factor in building a successful franchise is standardization. Regardless of the franchise location and ownership, standardization ensures customers will always be met with a consistent experience. For example, McDonald's is regarded as one of the world's most successful franchises. Thanks to standardization, their food is the same whether you're in Baton Rouge, Louisiana or Albuquerque, New Mexico. You always know what to expect when you see those golden arches.

The purpose of this manual

This manual was created using a fictitious window cleaning company named *Company ABC*. This content was provided to give you an example of a typical operations manual. As you customize the document to reflect your business, the name and many of the details will change. We recommend you save multiple copies through the writing process. This will allow you to refer to this document as the master template and your document as the new customized operations manual.

Guidance boxes

We've also included valuable text boxes with questions, notes and additional information to help you write each section. Read each box carefully before beginning each section. An example of guidance box:

Introduction pages

At the beginning of each chapter you will find a page outlining the goals for that chapter, questions to ask yourself, required materials and other important information to review.

Guidelines for preparation of the manual

- Remember, the operations manual is a living, breathing document. As such, the contents will continue to change over time right along with your franchise's standard operating procedures. Therefore, prepare the manual in manner that accommodates updates as they may occur from time to time.
- Many new franchisors do not have a written set of SOPs. Your franchisees will likely have little existing knowledge of your industry. The manual should be written in a manner that is easy to understand, even for the complete layperson. Manuals that are too complex or overly technical will be of little or no use to your franchisees.
- Leave no stone unturned, no detail unaddressed, and no procedure left to the discretion of your franchisees. Detail, detail, detail.
- Your manual should address different operation procedures, if any, as they relate to differences in geography, population, and other conditions that could affect the successful operation of a franchise.
- Maintain consistency between the manual and FDD. Discrepancies between the two documents could lead to legal trouble down the road.
- Obtain legal review. It is absolutely critical that you acquire local legal council to review your operations manual, franchise agreement and FDD. We are not legal experts; entering into franchising without legal oversight is an accident waiting to happen. Because franchising is such a litigious industry it is critical you do not skimp when finding an attorney. Your attorney must have a long track record of specializing in the franchise industry.

Let's get started!

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