

APEX ACADEMY

The Educational Division of Apex Ledger Group LLC

AA-FM-008 · OPERATIONS TRACK · FIELD MANUAL

The SOP Starter Template

A simple, repeatable format for getting a process out of your head and onto paper.

Systems outperform heroic effort.

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AA-FM-008 · First issued as part of the Apex Academy Free Resource Library.

Field Manual Details

Field Manual Number	AA-FM-008
Track Classification	Operations
Difficulty Level	Beginner
Estimated Completion Time	30–45 minutes per SOP
Prerequisite Manuals	None required — AA-FM-001 provides useful context but isn't necessary
Intended Audience	Owners and teams with processes that currently exist only as tribal knowledge

Executive Summary

This Field Manual gives you a simple, consistent format for documenting any process, so it lives on paper instead of only in someone's head. It opens the Operations track and introduces the Operational Maturity Scale™, the framework used to score every manual in this track.

Learning Objectives

- Write one complete, usable SOP for a real process in the business.
- Assess that process's current position on the Operational Maturity Scale™.
- Test the SOP against someone unfamiliar with the task.

Educational Introduction

A Process That Lives in One Head Isn't a System Yet

If a process only exists in one person's memory, it isn't a system — it's a dependency. The business can only run as fast, as consistently, and as calmly as that one person's availability allows. An SOP (Standard Operating Procedure) is what turns tribal knowledge into something the business actually owns.

A good SOP isn't a polished manual. It's a plain, clear, step-by-step description of how something gets done — written well enough that someone reasonably capable, who has never done the task before, could follow it and get a similar result.

The goal here isn't to document everything at once. It's to build the habit of documenting, one process at a time, starting with whatever would hurt the most if the person who knows it disappeared tomorrow.

APEX PRINCIPLE

Systems outperform heroic effort.

How to Use This Manual

- Pick one process — ideally one that currently lives in only one person's head.
- Write the steps in the order they actually happen, not the order they should happen in an ideal world.
- Keep language plain. Avoid jargon that only the person writing it would understand.
- Have someone else follow the SOP exactly as written and note anywhere they got stuck — that's your revision list.

Core Framework: The Operational Maturity Scale™

Every process sits at one of four maturity levels. This manual moves a process from the first level to at least the third — and the fourth is within reach once you complete the testing step.

- Reactive — handled case by case, no consistent approach.
- Repeatable — a consistent approach exists, but only in someone's head.
- Documented — the approach is written down and followable by someone new. (Where this manual takes you.)
- Optimized — the documented approach is actively measured and improved over time.

APEX INSIGHT

Most processes aren't actually Reactive — they're Repeatable but undocumented. The gap isn't consistency. It's that the consistency only exists in one person's head.

The Worksheet

SOP Header

Field	Detail
Process Name	
Owner (who maintains this SOP)	
Last Updated	
Purpose (one sentence)	

Tools & Materials Needed

Step-by-Step Instructions

Number each step. Include enough detail that someone unfamiliar with the task could follow it.

Common Mistakes to Avoid

Score Summary

Is This SOP Ready?

✓	SOP Readiness	Notes
☐	Someone unfamiliar with the task could follow it without asking questions.	
☐	Every tool or material needed is listed up front.	
☐	Steps are in the actual order they happen, not an idealized order.	
☐	A tester has followed it exactly as written and succeeded.	

COMMON MISTAKE

Owners often skip the tester step, assuming the SOP is clear because it's clear to them. Clarity to the author and clarity to a newcomer are two different things.

Count your checked boxes (out of 4) and record it below.

SOP Readiness	Checked (out of 4)
This SOP	

Interpretation Guide — Operational Maturity Scale™

Score Range	Interpretation
0–1 checks	Reactive. The process still lives primarily in your head — start with the step-by-step section.
2 checks	Repeatable. A consistent approach exists, but the write-up needs a full pass before anyone else can rely on it.
3 checks	Documented. Written down and structured — the missing piece is testing it with someone new.
4 checks	Optimized. Documented and tester-validated — ready to be relied on by the team.

APEX PERSPECTIVE

Reaching "Documented" is a real accomplishment on its own. "Optimized" only comes from someone besides you actually using it.

Reflection Questions

What surprised you most while writing this SOP down — a step you'd never consciously noticed, a decision point you make automatically?

Which other process in the business would hurt the most if it stayed undocumented? Is that your next SOP?

CEO Notes

Track which SOPs still need to be written, and who's responsible for writing each one.

WATCH FOR THIS

If you find yourself editing the SOP mid-test to help the tester along, stop — that's the exact moment revealing what the document is actually missing. Write it down, then let them continue.

Your Next 30-Minute Win

Hand this SOP to someone on your team who has never done the task, and watch (without helping) as they attempt the first three steps. Note exactly where they hesitate or ask a question — that's your revision list, and it's worth more than another round of self-editing.

Key Takeaways

- An undocumented process isn't a system — it's a dependency on one person.
- A good SOP is plain and testable, not polished. Clarity beats production value.
- Start with the process that would hurt the most if the person who knows it left tomorrow.

Recommended Next Field Manual

Field Manual	AA-FM-009 — The Weekly Team Meeting Agenda
Estimated Time	5 minutes to prep; 15–30 minutes to run
Why This Is Next	Because you're now documenting processes, your next step gives your team a consistent structure for surfacing what's working and what isn't, week to week.

Additional Learning Resources

Expands Into (Paid Workbook)	The Systems Library Builder Workbook — a structured program for documenting an entire business's core processes.
Complementary Workshop	"Getting It Out of Your Head" — a live session on capturing tribal knowledge efficiently.
Supports Future Certification	Apex Certified Business Operator — Module 5: Operational Systems.

Social Media Companion Content

Theme for this manual: turning tribal knowledge into something the business actually owns. Opens the Operations track.

LinkedIn

Long-Form Post

If a process only exists in one person's head, it isn't a system — it's a dependency. The business can only move as fast, as consistently, and as calmly as that one person's availability allows. Writing it down is what turns tribal knowledge into something the business actually owns. We built AA-FM-008, the SOP Starter Template — a simple, plain-language format for documenting any process well enough that someone new could follow it. Not a polished manual. Just clear enough to work. Systems outperform heroic effort. This is where that belief gets written down. Link in comments.

Carousel Outline (6 slides)

- Slide 1 — Hook: "A process in one head isn't a system. It's a dependency."
- Slide 2 — What makes an SOP actually usable.
- Slide 3 — The Operational Maturity Scale™, introduced.
- Slide 4 — How to test whether an SOP is ready.
- Slide 5 — Which process to document first.
- Slide 6 — CTA: "Download AA-FM-008, free."

Poll

Question: "How many of your core processes are actually written down?" Options: Most of them · A few · Almost none

Facebook

Community Post

Honest question: if you disappeared for two weeks, how many of your core processes could your team actually follow without calling you? We built a free, simple SOP template to help close that gap. Link below if it's useful.

Small Business Discussion Prompt

What's one process in your business that only lives in your head right now?

Story Version (text overlay sequence)

- Frame 1: "One head ≠ one system."
- Frame 2: "Free SOP Starter Template."
- Frame 3: "Swipe up — get it out of your head."

Instagram

Carousel Outline (5 slides)

- Slide 1: "Could your team run this without you?"
- Slide 2: The 4-part SOP structure, one icon each.

- Slide 3: "Plain, not polished."
- Slide 4: Pull quote — "Systems outperform heroic effort."
- Slide 5: CTA — link in bio.

Caption

A process that only lives in your head isn't a system — it's a dependency. This free SOP Starter Template (AA-FM-008) gives you a simple, plain-language way to write any process down. Link in bio. #smallbusiness #operations #apexacademy

Reel Script (35 seconds)

0-3s: On camera — "If only you know how to do it, it's not a system yet." 3-14s: "It's a dependency — the business can only move as fast as you're available." 14-24s: "This free template makes it easy to write any process down, plainly." 24-32s: "Not polished. Just clear enough to work." 32-35s: "Link in bio."

Story Sequence

- Story 1: Question sticker — "What process only lives in your head?"
- Story 2: Poll sticker — "Could your team run without you for 2 weeks? Yes / No"
- Story 3: "Get the free template" link sticker.

X (Twitter)

Five Short Posts

- A process in one person's head isn't a system. It's a dependency.
- A good SOP doesn't need to be polished. It needs to be followable.
- Start with the process that would hurt most if the person who knows it left tomorrow.
- If someone new can't follow it without asking questions, it's not done yet.
- Free SOP Starter Template (AA-FM-008) — link below.

Thread (5 tweets)

- 1/ If only one person knows how to do it, it's not a system. It's a dependency.
- 2/ An SOP turns tribal knowledge into something the business actually owns.
- 3/ It doesn't need to be polished — just plain enough that a newcomer could follow it.
- 4/ Test it: have someone else follow it exactly as written.
- 5/ Free template below.

Quote Graphic Caption

"Systems outperform heroic effort." — Apex Academy

YouTube

Video Title	How to Write an SOP Someone Can Actually Follow
Thumbnail Text	GET IT OUT OF YOUR HEAD.

10-Minute Educational Outline

- 0:00–1:00 — Hook: why one-person knowledge is a dependency, not a system.
- 1:00–3:00 — The Operational Maturity Scale™, introduced.

- 3:00–6:00 — Walk through the 4-part SOP structure.
- 6:00–8:00 — How to test and revise an SOP.
- 8:00–9:30 — Introduce AA-FM-008.
- 9:30–10:00 — CTA and which process to document first.

Call-to-Action

"Grab AA-FM-008, free, in the description — pick one process today and get it out of your head."

TikTok

Hook (first 2 seconds)

"If only you know how to do it, it's not a system."

45-Second Script

(0–4s) Hook line, on camera. (4–15s) "It's a dependency — the business can only move as fast as you're available." (15–28s) "An SOP turns that knowledge into something the business owns." (28–38s) "We made a free template — plain, simple, testable." (38–45s) "Link in bio."

B-Roll Suggestions

- Someone writing numbered steps on a notepad.
- A new team member following printed instructions successfully.
- Close-up of a checklist being checked off.

Closing CTA

"Grab AA-FM-008, free — link in bio."

Email

Subject Line	If only you know how to do it, it's not a system
Preview Text	A free template for writing any process down.

Educational Email

Hi [First Name], If a process only exists in your head, it isn't a system yet — it's a dependency. The business can only move as fast as your own availability allows. AA-FM-008, the SOP Starter Template, gives you a simple, plain-language format for writing any process down. Not polished — just clear enough for someone new to actually follow. Start with whatever would hurt most if you disappeared for two weeks. [Download AA-FM-008, free] Calmly, Apex Academy

Printing Recommendations

- If SOPs will be posted near a workstation, print single sheets on sturdy stock or laminate for durability.
- For a growing SOP library, a shared binder organized by department works well for physical teams.
- Digital-first teams: a shared, version-controlled document per SOP keeps "Last Updated" meaningful.

Canva Layout Specifications

Typography & Layout

- Same navy/gold/off-white system as the Foundation track, opening Operations with visual continuity.
- Design the step-by-step section with generous numbered rows and room for sub-steps — this page will be the most-referenced part of the document.
- Use a small "tools needed" icon strip at the top for quick visual scanning.

Score Interpretation Treatment

- Four-row table (not three) to match the Operational Maturity Scale™'s four levels — this becomes the standard interpretation format for the rest of the Operations track.

APEX ACADEMY

AA-FM-008 · The SOP Starter Template

Systems outperform heroic effort.

Continue the journey: AA-FM-009, The Weekly Team Meeting Agenda.