# Manual Writers

## Contents for Operations Manuals

## Contents for Franchise Manuals

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# Ops & Franchise Manuals Contents

## Contents

## Introduction

**This document contains <u>two</u> lists of suggested contents for manuals.**

- The first details the contents every business should include in their business operations manuals to drive performance and standards in their business.
- The second details the ADDITIONAL contents you need to add to an operations manual in order to create a Franchisee Operations Manual (also sometimes known as a 'franchise training manual').

We can create operations manuals, franchise manuals and training for you in simple and affordable ways.

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## Examples of sections and main subjects in operations manuals.

(This is a short example of main topics. If you're looking for a detailed list of all the sections, subjects and sub-headings a manual should contain, check the **Manual Writers online shop** regularly – we'll be adding detailed content guides for different sectors over time).

| Example Sections | Example Chapters |
|---|---|
| *List of Contents* | |
| *Useful Contacts & Resources* | |
| *Document Control* | Copyright. |
| | Version & updates. |
| | Safekeeping. |
| | Registration. |
| *Introduction/ Quick Reference* | Corporate/CEO message. |
| | Purpose of this manual. |
| | How to use this manual. |
| | Where to find additional support/resources. |
| *Team Knowledge* | *A pull-out section that summarises the key history, organisational structure, branch/divisional structure, culture, mission, vision, ethics, core values, corporate responsibilities, brand image and security, product and service types, market-base, service standards, customer experience, approach, facilities, expectations, training and support paths, overriding policies, etc. of your organisation that every team member should know – irrespective of their function.* |
| *New Branch/Unit/Site Set-Up (where applicable)* | Feasibility studies/ business planning/ deadlines. |
| | Site selection and contracting, design, planning and permissions. |
| | Project Management, dealing with contractors/suppliers. |
| | Site development, works, completion, snagging, stocking etc. |
| | Team recruitment, induction and training. |
| | Promotion and launch. |
| *Working with Head Office* | ***Where your organisation operates several branches (or sites), branch manuals need to include a section detailing how they interact with and report to your head office (and what resources are centralised, how performance is reviewed, how network management and visits work, etc.).*** |
| *General Management* | Role & responsibilities (ops, admin and performance). |
| | Management approach and style. |
| | Managing operations – function by department. |
| | Management timetable. |
| | Team meetings and briefings. |
| | Opening, handover and closing procedures in detail. |
| | Team allocation, minimum-staffing, rotas, skills development etc. |
| | Suppliers and purchasing procedures. |
| | Oversight of sales. |
| | Financial procedures. |
| | Administration. |
| | Statutory responsibilities. |
| | Performance review. |
| | Duty and on-call management and rotas. |
| *Management by Function* | ***Chapters and subjects will vary by the function, role and responsibilities of each manager – so a manual should contain a separate section for each management role.*** <br> *(E.g. a **restaurant** might include sections for Events, FOH, Bar, BOH, Kitchen, Line and Stores Managers – and a **manufacturer** might separate Receiving, Plant, Line, Quality, Maintenance, Procurement, Warehousing and Logistics and Sales Managers).* |
| *Sales* | Market, customers/clients and competition. |
| | Product and (or) Service knowledge, USPs. |
| | Pricing and discounting policies. |
| | Lead generation/ approaching customers. |
| | Sales skills, methods, approaches, etc. |
| | Sales Follow-up and management. |
| | Upselling and cross-selling. |
| | Closing and processing/contracting/ringing-up sales. |
| | After-sales. |
| | Generating repeat business. |
| | Example sales scripts/ practice scripts. |

| Example Sections | Example Chapters |
|---|---|
| *Operations – unit opening/handover/closing* | Pre-opening cleaning. |
| | Pre-opening preparation. |
| | Pre-opening briefings. |
| | Opening procedures. |
| | Shift handover procedures. |
| | Closing procedures. |
| | Opening, preparation, handover and closing checklists. |
| *Operations – product or service creation* | *Chapters here depend on the type and sector of your business.* |
| | *(E.g. a **manufacturer** may include step-by-step procedures for the operation of each of its lines; a **house-builder** might separate and detail offsite pre-fabrication steps and on-site fabrication works step-by-step; a **coffee shop** might include chapters on coffee and beverage making, cold/self-service food preparation, hot food preparation, pre-packaged food display, specials etc).* |
| *Operations – product or service delivery/ logistics* | *Chapters here depend on the type and sector of your business.* |
| | *(E.g. **coffee shops** might include chapters on barista, counter and or table service, drive through, delivery and takeaway; a **manufacturer** may include order processing, scheduling, holding, warehousing, picking and packing, logistics and dispatch; a **professional service** might detail customer engagement, agendas, visits and meetings, report formats etc; **a hotel** may need additional sections to handle different services – e.g. reception, guest services, accommodation, catering, retail, recreation, entertainment, pool, outdoor activities etc.).* |
| *Operations – customer service* | *Chapters here depend on the type and sector of your business, the extent of interaction with customers at point of sale and afterwards and whether you are engaged in face-to-face customer service, remote customer service, after-sales service and continuing customer interaction etc.* |
| | *(E.g. **hotel** manuals tend to include more on customer service because staff interact with and influence guests in many ways during their stay. Manuals for **online retailers** contain less because they have little interaction with customers at point of sale, so focus on after-sales queries, returns and complaints).* |
| *Operations – unit image, merchandising etc. (as appropriate)* | *Chapters here depend on the type and sector of your business.* |
| | *(E.g. a **manufacturing** business that only meets its clients off-site may have fewer policies concerning site presentation than a **retailing business** that would suffer lower sales if its shops were not properly presented and merchandised).* |
| *Operations – use of IT, software, tills etc.* | *Explain the use of all IT in the business step-by-step. (Usually accompanied by screengrabs).* |
| | *Policies for use of software and equipment.* |
| | *Policies for use of internet.* |
| | *Policies for remote access, homeworkers etc. (if applicable).* |
| | *IT support and contractors.* |
| *Cleaning and Maintenance* | Responsibilities for scheduled and ongoing cleaning. |
| | Cleaning procedures. |
| | Cleaning standards. |
| | Cleaning and deep cleaning schedules and checklists. |
| | Storage of equipment and chemicals, specifications, COSHH and health & safety. |
| | Responsibilities for maintenance. |
| | Maintenance procedures. |
| | Maintenance standards. |
| | Maintenance schedules. |
| | Statutory maintenance, testing and inspections. |
| | Health & Safety in maintenance. |
| | Tracking cleaning and maintenance works. |
| | Managing third-party cleaning and maintenance contractors. |
| | Cleaning and Maintenance risk-assessments and mitigation. |
| | Equipment manuals. |

| Example Sections | Example Chapters |
|---|---|
| *Health & Safety* | *Chapters here depend on the type and sector of your business. But MAY include:* |
| | Statement of general policy on health & safety at work. |
| | Responsibilities. |
| | Health & Safety training and supervision. |
| | Authorised operators/ use of equipment. |
| | Personal Protective Equipment (PPE) |
| | Warnings & signage, visibility and lighting. |
| | Movement, separation and access. |
| | Manual Handling. |
| | Working at height. |
| | Use of hazardous equipment. |
| | Workplace diseases, contamination and mitigation. |
| | Controlled Substances. |
| | COSHH |
| | Accidents, diseases, investigations – and RIDDOR |
| | Fire safety, evacuation and marshalling. |
| | Hygiene. |
| | Food safety and handling (and HACCP) |
| | Allergens. |
| | First aid. |
| | Security. |
| | Lone workers. |
| | Safeguarding. |
| | Insurance. |
| | Emergency procedures and emergency action plans. |
| | Risk assessment schedules and records. |
| | Risk assessments and policies to mitigate specific risks. |
| *General administration and reporting* | Sales & receipts – policies and processes. |
| | Procurement policies and processes. |
| | Financial policies and processes (budgeting, pricing and margins, invoicing, payment terms, credit-control, purchasing, debt-management, payroll, bookkeeping, accounting, petty cash, expenses, travel, taxation, commissions, gratuities, etc.) |
| | Reports (internal, to head-office, to third parties). |
| | General correspondence. |
| | Policies for use of phones. |
| | Policies for use of email, internet, social media and IT equipment. |
| | Data and documents, filing, backup, storage & retrieval. |
| | Insurance. |
| | Legal. |
| | Responsibilities, records, audit trails and review. |
| | Statutory records and periods of retention. |
| | Suppliers – selection, contracts, management and review. |
| | Contractors – selection, contracts, management and review. |
| | *(And much more, depending on your type of business)* |
| *Marketing, promotion and communication* | Standards and ethics. |
| | National campaigns. |
| | Local activities. |
| | Use of Internet and Social Media. |
| | Loyalty, membership and reward programmes. |
| | Sponsorship, events and community marketing. |
| | Customer and marketing data. |
| | Review & measurement of effectiveness. |
| | Brand protection & emergencies (e.g. responding to bad publicity). |
| | Marketing materials and resources. |
| | Brand book/ brand, image and format guidelines. |
| *Human Resources – Team Standards* | Minimum expected standards of behaviour. |
| | Personal presentation, hygiene and uniform(s). |
| | Communication – internal, with customers, external. |
| | Representation. |
| | Acting as ambassadors for the brand. |
| | Use of phones, internet, social media. |
| | Confidentiality, protection of commercial secrets. |
| | *(More on HR – next page)* |

| Example Sections | Example Chapters |
|---|---|
| *Human Resources – Management and Policies* | Staffing requirements (ongoing and seasonal) |
| | Capacity management. |
| | Allocation and rotas. |
| | Managing and reducing churn (and back-filling). |
| | Recruitment. |
| | Processing new recruits, contracts, right to work etc. |
| | Induction. |
| | Remuneration and benefits. |
| | Performance review and appraisal. |
| | Common performance issues and solutions. |
| | ***Specific HR policies and documents.*** |
| | (E.g. contracts, staff handbooks, holiday entitlement and authorisation, remuneration and benefits, absences, equal opportunities and discrimination, harassment in the workplace, representation and communication, meetings, trade-unions, use of telephones/internet/post, use of computers, training, appraisal and review, lay-off/short time working, redundancy, GDPR/data-protection, drugs and alcohol, hygiene and personal presentation, communicable diseases, non-smoking, discipline, warnings/ suspension/termination, grievances, arbitration, pensions, payroll procedures, expenses and petty cash, etc.). |
| *Training* | Training and career development paths. |
| | Training policies. |
| | Training types, suppliers, venues and schedules. |
| | Induction training (new starter, seasonal). |
| | Ongoing training and skills development programmes. |
| | Continuing Professional Development (CPD) requirements, programmes and schedules. |
| | Statutory training (e.g. health and safety) |
| | Scheduled (internal or statutory) refresher training. |
| | Certification, testing, measurement and review. |
| | Selection, management, measurement of training providers. |
| *Dealing with Issues and Emergencies* | Internal contacts in case of emergency. |
| | External emergency contacts. |
| | Awareness, risk assessment and prevention. |
| | Processes to proactively manage emerging issues. |
| | Process to review and learn from emergencies afterwards. |
| | Emergency Action Plans (EAPs) – immediate threat or disaster |
| | Emergency Action Plans (EAPs) – accidents, injuries, disease |
| | Emergency Action Plans (EAPs) – abuse, violence, threat to person |
| | Emergency Action Plans (EAPs) – hacking, IT invasion, virus |
| | Emergency Action Plans (EAPs) – other commercial threat |
| *Environment* | Corporate responsibility and environmental mission/vision. |
| | **Specific environmental policies:** E.g. |
| | Monitoring and improvement of the environment. |
| | Reduction of waste and use of specific materials. |
| | Use of consumables and disposables. |
| | Sustainability of supply. |
| | Selection of likeminded suppliers, contractors, retailers etc. |
| | Waste management. |
| | Recycling. |
| | Mitigation of impact of waste at point of sale/ after sale. |
| | Reducing impact of travel, transport, logistics etc. |
| | Energy usage and supply. |
| | Water usage and supply. |
| | Clean air. |
| | Clean water. |
| | Noise pollution. |
| | Light pollution. |
| | Reducing impact on local habitats – flora and fauna. |
| | Programmes to offset carbon footprint. |
| | Environmental EAPs. |
| *Other statutory or corporate policies* | (Such as GDPR/Data-Protection, Corporate Responsibility, Adapting to Brexit, etc.) |

# Examples of **additional** sections and subjects for franchise manuals.

The table below details additional subjects to include in franchisee operations manuals ON TOP OF the subjects already detailed in operations manuals tables above. Again, it's an example and not exhaustive.

| Additional Example Sections (for franchise manuals) | Example Chapters |
|---|---|
| Confidentiality agreement | Confidentiality agreement. |
| | Authorised users. |
| | Serial. |
| Useful Contacts & Resources | **Add:** |
| | Franchise support centre (head office) contacts. |
| | Key nominated supplier contacts. |
| Introduction/ Quick Reference | **Add:** |
| | Introduction to the franchise. |
| | Details of the franchise network. |
| | Details of types of franchisee. |
| New Branch/Unit/Site Set-Up (where applicable) | **Add:** |
| | Support during setup. |
| | Time plan. |
| | Territory. |
| | Business Planning. |
| | Funding. |
| | **Other items specific to a franchised unit's set up, such as:** |
| | Project Management responsibilities – franchisee/franchisor |
| | Working with franchisor nominated suppliers (architects, designers, builders, fitters, etc.) |
| | Initial equipment & supplies. |
| | Unit opening plan. |
| | Pre-trading checklist. |
| Operations – franchise reports and review | Reports (internal). |
| | Reports (to franchisor/ support office). |
| | Performance reviews. |
| | Support visits and inspections. |
| | Mystery Shoppers. |
| | Surveys. |
| | KPIs |
| | Franchised network benchmarking. |
| Operations – use of IT, software, tills etc. | **Add:** |
| | Use of franchise management software. |
| | Ownership of data. |
| | Use of IT – policies. |
| | Backing up data. |
| | Sharing data with franchisor. |
| | Continuation of business during an outage. |
| | Service Level Agreement – franchisee software. |
| | Preferred Nominated Suppliers – software & maintenance. |
| | Preferred Nominated Suppliers – equipment & maintenance. |
| Marketing, promotion and communication | **Add:** |
| | Franchisor's minimum standards in sales and marketing. |
| | Franchisor responsibilities – sales and marketing. |
| | Franchisee responsibilities – sales and marketing. |
| | Minimum activities by franchisees expected by franchisor. |
| | Activities that must ONLY be handled centrally by the franchisor. |
| | Activities franchisees can do without further authorisation. |
| | Activities that require further authorisation. |
| | Suggestions for local activities. |
| | Support from the franchisor/support office. |
| | Opting in or out of national campaigns and promotions. |
| | National loyalty schemes. |
| | Policies on control, limitation and operation of franchisee's use of internet, websites, email and social media. |
| | Brand protection. |
| | Handling approaches from the media. |
| | Emergency Marketing Plan – steps and communication following incidents or bad publicity. |
| | Nominated suppliers. |
| | Who pays for what marketing? |
| | Requests for marketing and activities from the support office. |
| | Reports on results of marketing to the franchisor/support office. |

| Additional Example Sections (for franchise manuals) | Example Chapters |
|---|---|
| *Franchise specific administration* | Franchise Agreement – specific terms to highlight. |
| | Minimum acceptable standards and effort. |
| | Minimum levels of insurance. |
| | Indemnifying the franchisor. |
| | Communication with the franchisor/support office. |
| | Specific administration tasks. |
| | Minimum filing and record-holding requirements. |
| | Franchisor access to records. |
| | What to do when facing difficulties. |
| | Where to get additional support. |
| | Support included in fees. |
| | Paying for support that's not included. |
| *Health and Safety* | **ADD:** |
| | ***Disclaimer (that you're not responsible, the franchisee and nominated H&S provider are – any policies mentioned are only unqualified suggestions or examples).*** |
| | Defined responsibilities franchisee and franchisor. |
| | Working with nominated H&S provider. |
| | Steps to take in an emergency. |
| | Informing the franchisor/support office of incidents. |
| | **AND:** |
| | Franchisor's required minimum health and safety standards. |
| *Human Resources* | **ADD:** |
| | ***Disclaimer (that you're not responsible, the franchisee and nominated HR/Employment Law provider are – any policies mentioned are only unqualified suggestions or examples).*** |
| | Defined responsibilities franchisee and franchisor. |
| | Working with nominated HR provider. |
| | Steps to take in a dispute. |
| | Informing the franchisor/support office of disputes. |
| | **AND:** |
| | Franchisor's required minimum HR standards. |
| *Training* | **ADD:** |
| | Franchisee Team – induction training plan. |
| | Franchisee (directors) induction training. |
| | Franchisee (general managers) induction training. |
| | Franchisee (staff) induction training. |
| | Responsibilities for training – franchisee/franchisor. |
| | Costs of training – franchisee/franchisor. |
| | Attendance at training – mandatory elements/ optional elements. |
| | Types of training. |
| | Franchisee CPD. |
| | Franchisee – Initial Business Coaching. |
| *Franchise Issues and Disputes* | Communication between franchisees. |
| | Communication with the franchisor/support office. |
| | Respect of fellow franchisees. |
| | Exclusivity of territories. |
| | Non solicitation. |
| | Internal exchanges of business. |
| | Review meetings – formal/informal/frequency. |
| | Preferred Nominated Suppliers (and disputes). |
| | Franchisee disputes with franchisor/support office. |
| | Arbitration. |
| | Franchisee discipline, suspension and termination. |
| | Relief or replacement managers. |
| | Franchisee 'Service Charter'. |
| | BFA Code of Ethics. |
| *Franchisee Growth, Sale and Exit* | Selling a franchised unit or business. |
| | Marketing a franchised unit for sale. |
| | Valuations. |
| | Timescale. |
| | Alternatives to sale or exit. |
| | Franchisor requirements in a sale or exit. |
| | Conditions for purchaser. |
| *Appendices* | **Add**: |
| | Franchise specific appendices. |
| | Nominated suppliers and supply specifications. |
| | Emergency and alternative supply process. |

# Manual Writers

## Get in Touch/ Ways We Can Help

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Because our manuals explain every task in your operation step by step and are written bespoke - we can use the 'language' of your brand to create manuals that are easy to follow and that your Team actually use. And we manage the whole process and write everything for you.

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To remain successful, your business must adapt for Brexit (even if you don't trade in Europe). Let us develop the new procedures and manuals you need to stay ahead, leaving your team free to concentrate on your success post-Brexit.

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Existing manuals become less useful (even dangerous) without regular review – as they won't detail changes to procedures and may contain/omit policies contrary to law. We review manuals, manage changes, write updates and help introduce new versions to your Team or franchisees.

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We have served clients in all sectors at all stages of development and have the experience to advise you on performance and improvement, Standard Operating Procedures (SOPs), best practices, growth, organisational structures, change management and more.

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With over 20 years' experience serving franchises in all sectors, our franchise manuals reinforce relationships with franchisees, protect your brand and provide clear step-by-step guides for franchisee (and head office) operations to a high standard.

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Good training is imperative to support your manuals. We create engaging programmes that your Team will enjoy and your business (or franchise) will profit from – and can deliver them too.

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