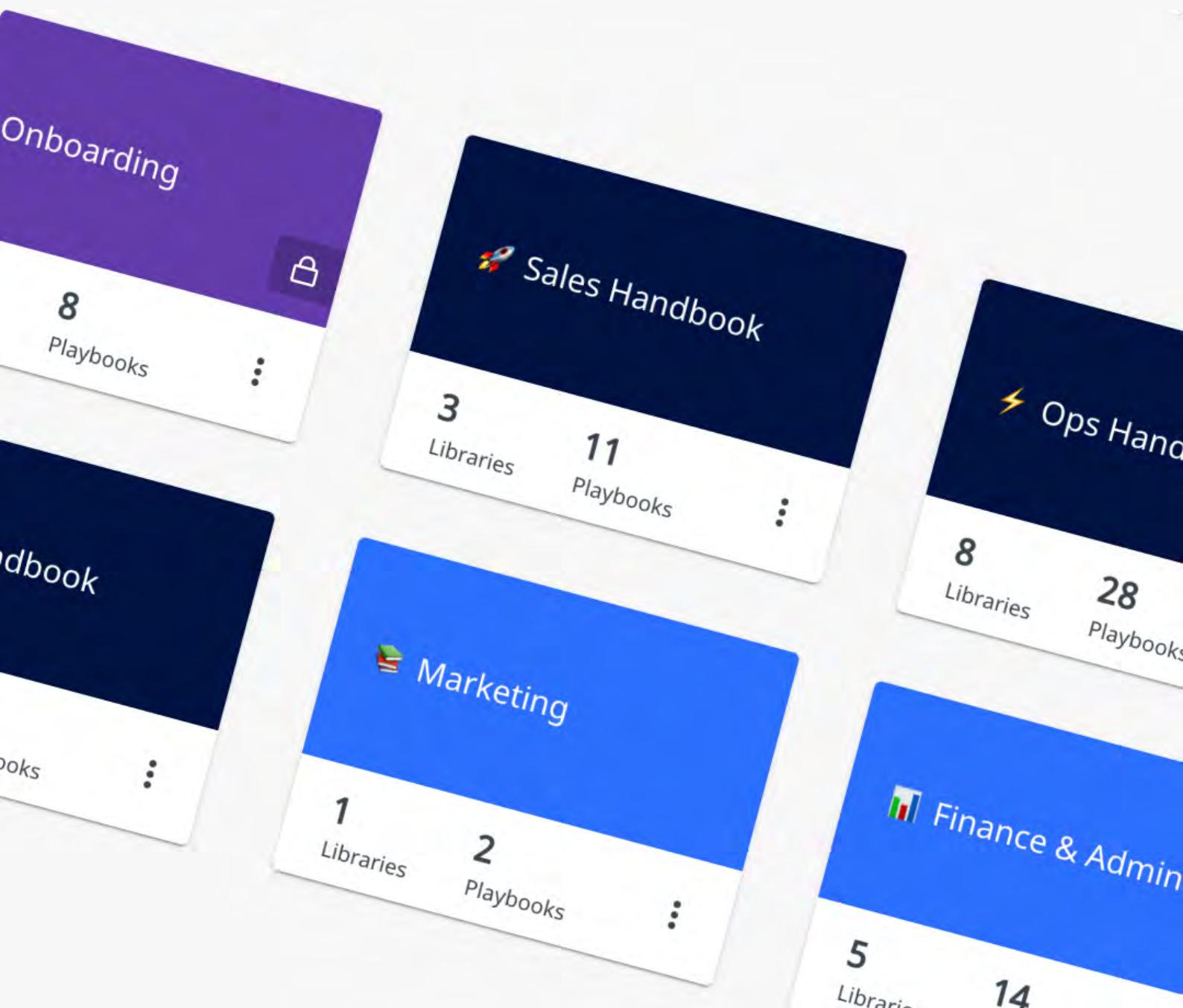


The Ultimate Guide to SOP and Knowledge Management

Know you need to optimize your documentation but not sure where to start? Don't sweat it. Getting started is simple with this arm-around-the-shoulder guide.



Welcome on your ultimate documentation journey.

Knowledge management is make-or-break for growing businesses.

Get it right and your employees can work to their full potential (meaning more productivity and higher revenue). But get it wrong? And you can say goodbye to restful nights.

The problem is, creating, managing and leveraging documentation is one of most companies' major pitfalls — with disorganized documentation ranking as a top 10 employee pain point, and 67% of employees saying their company's broken processes prevent them from maximizing their potential.

Clearly, things need to change.

To onboard, train and support your teams better, companies need to focus on creating accessible documentation that employees actually want to use.

There's a lot to learn to get it right — but we're here to help.

No matter where you're starting from, this arm-around-the-shoulder guide will show you exactly how to leverage your documentation to its full potential.

76% of business leaders say document process issues impact revenue. [Source: IDC]

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GET STARTED

Create and centralize your documentation

Most companies either struggle to get tribal knowledge out of their heads and onto paper, or find it hard to create and share docs that teams can actually use.

But creating and centralizing documentation doesn't need to be difficult. To get started, all you have to do is follow these three steps:

- **Understand why documentation is worth it**
- **Kickoff your documentation journey**
- **Engage your employees with the right tools**



“You get a lot of clarity on how you’re doing things once it’s written down. As long as a process remains in your head, it’s just this abstract thing you’re doing on automatic pilot without really looking at it closely.”

Gary Vanbutsele, Co-founder and CEO, Whale

GET STARTED

Understand why documentation is worth it

When you have an everyday process your teams are already familiar with, it can seem like a time-waster to write it down.

But trust us, it's worth the effort.

When you get tribal knowledge out of your employees' heads and onto (digital) paper, you can see exactly what you're working with and what needs to change.

Here are a few more reasons why getting your processes on paper is everything:

Boost employee engagement:

The better your procedures, the more likely your employees will actually enjoy their roles. With 51% of employees feeling unengaged at work, creating processes your teams want to engage with should be your #1 priority.

Never lose knowledge:

When employees leave, they take 42% of their role knowledge with them, leaving new hires having to relearn it all from scratch. Write it down before they leave, and the problem disappears.

Spot opportunities for improvement:

Even the most well-used process can be improved. Once you have it down on paper, you'll be able to spot bottlenecks and areas for improvement.

"When employees leave, they take 42% of their role knowledge with them, leaving new hires having to relearn it all from scratch."

Source: HR Daily Advisor



TOP TIP

To capture tribal knowledge, ask the employee(s) on the job to explain how they run each process from start to finish.

The screenshot shows a digital documentation interface. On the left, there's a vertical sidebar with icons for navigation. The main content area has a header "Welcome To Whale" with a sub-header "To all newcomers, Welcome to the family :)" and a "1st week" badge. Below this is a list of 7 items: 1. Laptop Policies (which is currently selected and highlighted in blue), 2. First Week - Need to know, 3. Password Policy, 4. Your colleagues, 5. Lunch, 6. Monthly - All hands call, and 7. Your workplace. To the right of this list, under the heading "Laptop Policies", is a sub-section titled "1. The disposition of the portable PC". It contains text about the employer giving the employee a personal computer (PC) for work. Further down, there are sections for "2. Property and return" and "3. General responsibility of the employee". At the bottom right, there's a "1st week" badge.

GET STARTED

Kickoff your documentation journey

Now you know why it's worth streamlining your documentation, it's time to figure out how to create and centralize your processes.

This one's a biggie, so grab a coffee and let's get going. 

Set your goals:

All great strategies start with setting goals — and documentation is no exception. Think about what you want to achieve by documenting your processes, why it's important, and what the desired results are.

Identify core processes:

Once your goals are in place, it's time to focus on one department at a time to pinpoint the processes that make each one tick. (Think: HR, marketing, sales, operations, accounting and customer retention.)

Track key activities:

Next, Ask your employees to track all of their activities during one week. If your company has any additional activities that weren't mentioned, add these at the end of your list.

Make a process inventory:

The next step is to file your activities into a process inventory. Name each one, give it a brief description, check in with managers for accuracy, and delegate each process to an owner.

Set targets:

Now you have a process inventory, it's time to set some targets and get this ball rolling. First off, estimate the time it'll take to document each process, then set some deadlines and block out time to work on each one.

Prioritize:

Feeling overwhelmed? Here's how to prioritize your process documentation:

- Focus on low hanging fruit with the 20:80 approach — simply pick out 20% of the major steps that get you 80% of the results.
- Check back in with your goals, make a list of the top 10 core processes, and start with these.
- Get data-driven and look for repetitive questions in email or chat tools to find out which processes your teams rely on the most.

Start documenting:

You've done the hard part, now it's time to put pen to (digital) paper and start documenting your processes. Here's a quick checklist to get you started:

- ✓ Use your company's common terminology
- ✓ Start with rough drafts
- ✓ Add images, videos and details later
- ✓ Avoid information overload
- ✓ Use templates to create consistency
- ✓ Include the title, purpose, who's involved, steps, input and output

[**Download our Excel Template
here to get started today**](#)

GET STARTED

Engage your employees with the right tools

Today's workers are part of the 8-second attention span generation, which means your documentation needs to be super engaging and easy-to-digest.

Goodbye boring manuals, hello inspiring technology. 

To get it right, you need to use a tool that leverages your documentation and makes it fun to use. Here's how to use tech to create eye-catching SOPs your employees will love:

Keep it simple:

No one wants to trawl through pages of boring manuals. Keep your documentation as bite-size and jargon-free as possible.

Use customizable templates:

With Whale, you have access to 75+ pick-and-play SOP and process templates to help you get through the journey quicker and easier.

Make it visual:

In the age of memes and Netflix, your employees are used to being entertained at every turn. We're not saying you need to be a comedy genius, but adding images, videos and gifs to your docs can make a huge difference to how often they're used.

Highlight important sections:

Your employees are busy people, so make it easy for them to spot the info they really need. Use design tactics like emojis or different fonts to shine a spotlight on the important stuff.



We know one tool that fits the bill. With Whale you can create eye-catching documentation and leverage it from one central hub. Simple.

Create and centralize with Whale 

View all your information in our unique visual interface, so nothing gets buried.

Organize your content in different levels with specific permissions.

Get started with 75+ simple documentation templates as a source of inspiration.

Share bite-size info with easily digestible cards. Create super engaging docs with the simple Editing tool.

DIVE DEEPER

Leverage documentation across your teams

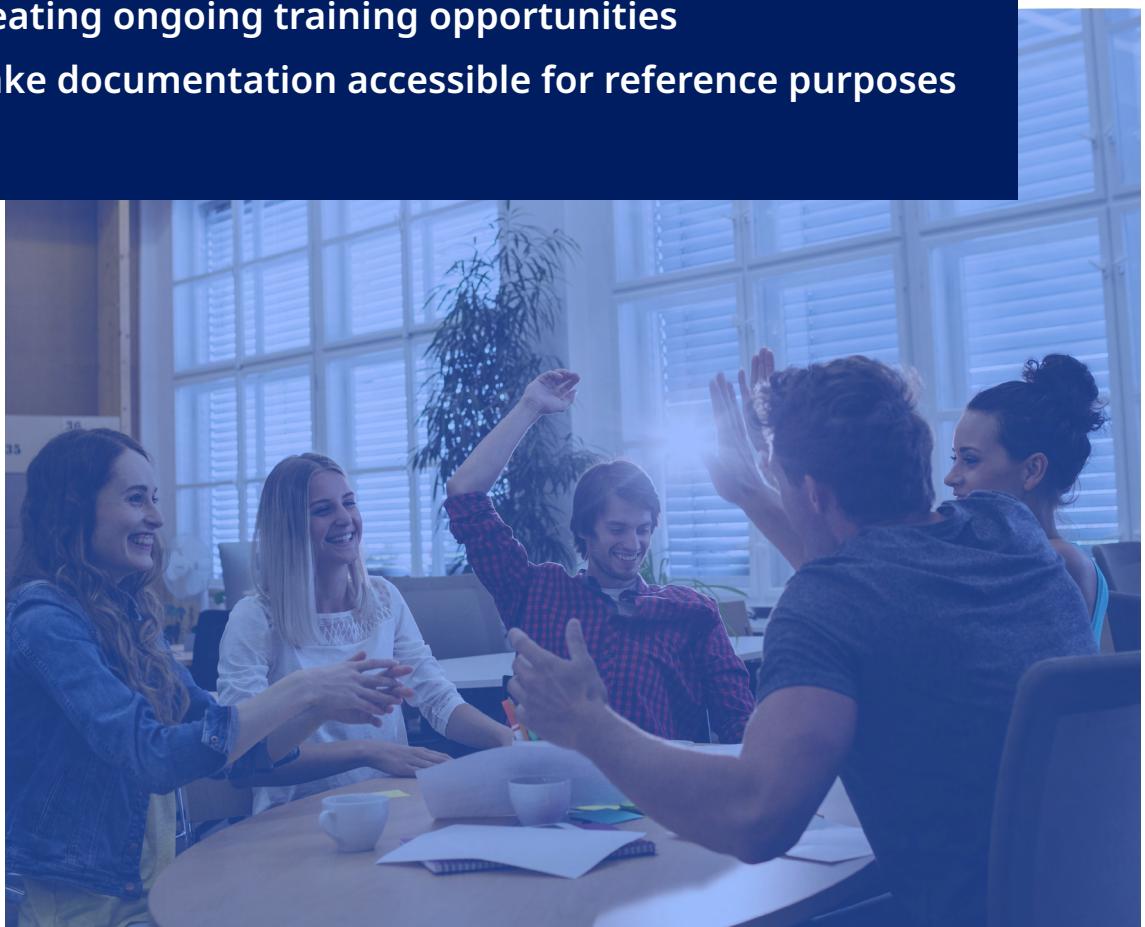
Congrats! You've got all your processes digitized in a central hub and you've optimized them for a super engaging employee experience. 😊

And if your documentation isn't usable, your business will suffer.

From onboarding, to process and tool training, you need to leverage your content across teams and employees to make sure everything is easily accessible and ready to use.

Here's how to leverage documentation across your teams:

- **Improve your new hire onboarding process**
- **Creating ongoing training opportunities**
- **Make documentation accessible for reference purposes**



“With great process documentation and clear instructions you can support your employees throughout their career; from onboarding, to ongoing training and reference.”

Gary Vanbutsele, Co-founder and CEO, [Whale](#)

DIVE DEEPER

Make documentation accessible

These days, employees expect to be treated as individuals (and rightly so) — that means giving them access to the information they need for their specific role, and nothing more.

With 46% of Gen Z workers (read: your newest workforce) saying they want personalization of the employee experience, it's more important than ever to tailor the documentation journey from onboarding through to your most experienced employees.

Here's how to make documentation accessible and personalized to each employee:

Personalized dashboards

Gone are the days of heavy paper manuals, these days it's easy to give employees bite-size information they actually need (instead of tons of boring info they don't). Smart knowledge and training tools offer employees their own personalized dashboards, so they can easily view the info relevant to their role.

Learning in the flow of work

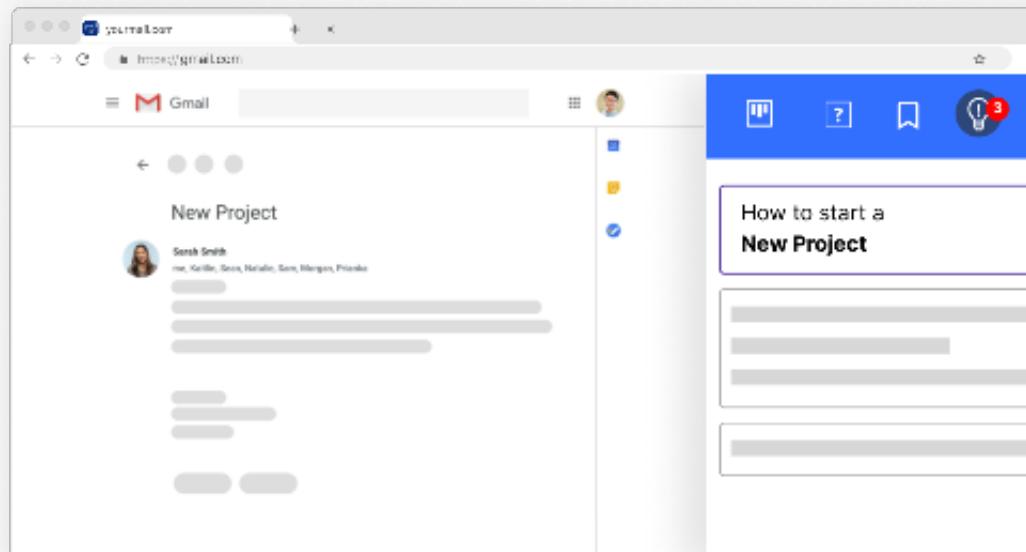
Picture a world where employees don't even need to ask for information. Instead, the docs and processes they need for each digital task appears whenever they need it. Simple.

Tailored learning journeys:

Show employees they matter from day one by creating bespoke learning paths that support employees from onboarding onwards. The right training platform will allow you to schedule specific trainings to individual roles, so individual employees get what they need, when they need it.

Whale Deep Dive

Whale's Web Extension is the ideal tool to give employees the contextual knowledge they need in the tools and apps you already use. Automatically suggest the right procedure from within your ERP, Project management, or CRM with the Whale Web Extension. Or create QR codes that contextualize learning in physical areas.



DIVE DEEPER

Track team progress

From what you eat to where you run, the world has become tracking obsessed — and the workplace is no exception.

But without a tracking tool to help, you're basically driving blindfolded.

When it comes to documentation, smart tech can help track the processes your employees readv (and the ones they don't), so you can drill down on data-led insights to update and improve company processes, eyes open.

Leverage your content with Whale

Browse for company information and filter down to get what you need, fast.

Assign tailored content for onboarding or process training.

Track team progress in the tracking dashboard.

Share contextual knowledge in the tools and apps your teams already use.



TOP TIP

Look for a knowledge and training tool that includes a tracking dashboard, so you can see trends over time and run reports to improve your documentation journey.

PRO LEVEL

Manage and keep your processes up-to-date

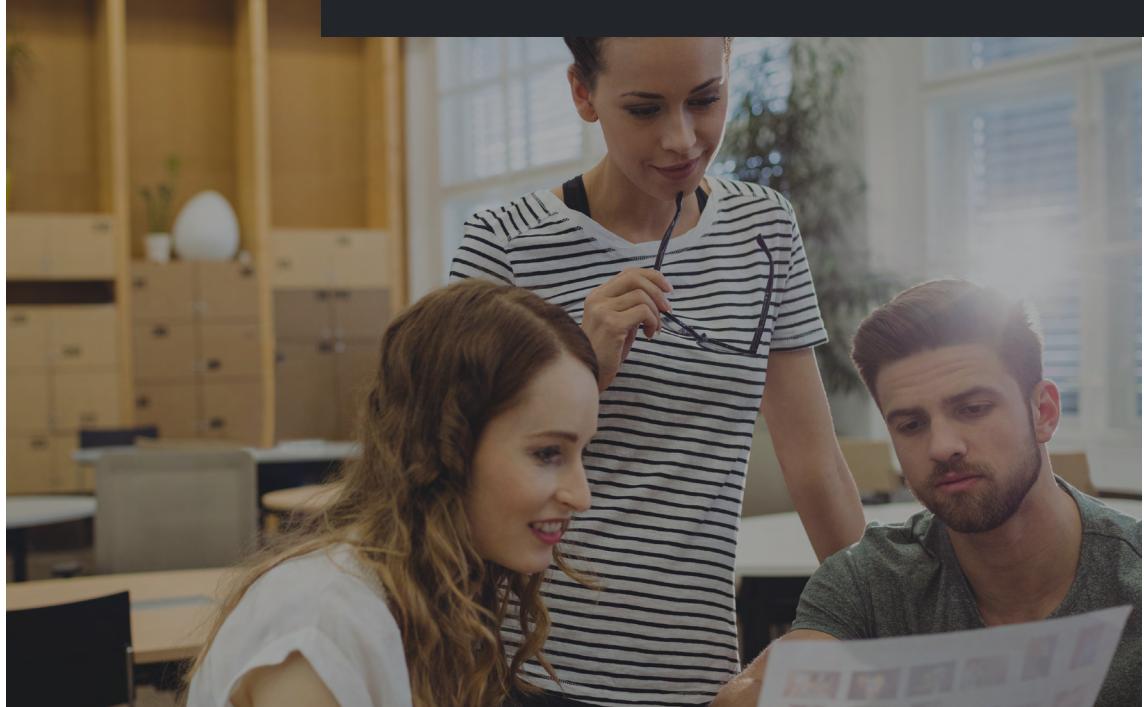
Wow. You've just made it to pro level. You've created killer documentation, shifted it to one central hub, and learnt how to leverage it properly.💡

Now, it's time to manage documentation the right way.

With only 4% of companies measuring and managing their processes efficiently, this one's a biggie — so let's dive straight in.

These are the steps you need to manage and update your documentation like a pro:

- Get your teams involved
- Use analytics to improve and update



"In a fast-paced entrepreneurial organization, you can't just take your handful of core processes when they're done, put them on the shelf and expect they're never going to change... You have to look at your core processes at least once a year and see whether they're still relevant, and drive a mindset of continual improvement around them."

Jason Green, Professional EOS Implementer, [Workcraft](#)

PRO LEVEL

Get your teams involved

Whoever said, 'There's no 'I' in Team' obviously knew a lot about knowledge optimization — because getting your teams onside is everything when it comes to managing documentation.

Here are a few top tips to get your employees involved in the process:

Delegate SOP updates to subject matter experts:

There's no point trying to update SOPs you know nothing about. Instead, give ownership to the people who know the most and let them contribute to the process.

Ask for feedback:

No one knows your processes better than your employees. Make the most of their knowledge by asking for feedback on how to improve.

Set review dates:

Specify when your process need to be reviewed. Since your company keeps evolving it's important to build a system for keeping everything up-to-date on a regular basis.

TOP TIP

Empower your employees by giving them the option to feedback on processes that do or don't work. Try sending quick pulse surveys or adding a 5-min feedback slot on your next meeting's agenda.

The screenshot shows the 'My dashboard' page of the Whale platform. On the left, there's a sidebar with icons for Personal (Your centralized to do hub), My dashboard (selected), Bookmarks, Tracking, Assignments, and Questions. The main area has a header 'Hello, Bram' with a 'Get started' button. It displays a message: 'You have 0 open assignment(s), 0 question(s), 0 comment(s) and 0 review(s). Do you have any questions today? Don't hesitate to Ask an internal expert'. Below this is a section for 'Your to-do items' with four boxes: 'Assignments' (4 items), 'Questions' (0 items), 'Comments' (0 items), and 'Reviews' (0 items).

Looking for a tool to track documentation performance? Look no further.

[Get in touch for a free Whale trial today!](#)

PRO LEVEL

Use analytics to improve and update

In the age of data, this step should come as no surprise — because you need to know how your teams use company knowledge in order to manage and improve it.

Here are a few key KPIs to help understand how well your documentation is performing:

Which individual employees have viewed which procedures and how often.

What employees are searching for in your company's knowledge base.

The best performing SOPs, steps and instructions.

Which media-types get the best views. For example, are your teams more likely to watch a video than use a flow chart?

Manage and update with Whale

Collaborate with colleagues with context-sensitive comments.

Assign subject matter experts to answer specialist questions in real-time.

Schedule review intervals to create accountability and keep docs up-to-date.

Discover useful insights with the analytics dashboard to identify areas for improvement.



Once you know what your teams are searching for, you can use the data to spot gaps in your knowledge base. For example, if employees keep searching for 'How to write an SOP', you might want to consider creating some assets to help. Think: templates, how-to videos, etc.

Lead the way with smart processes

The documentation journey is full of time-sapping pitfalls (think: outdated SOPs and graveyard Google docs) — but there is another way.

From getting tribal knowledge on paper, to using data-driven reports to improve your system, you can make sure your processes work for you to increase productivity, improve the employee experience and boost your bottom line.

With the right knowledge sharing tools and a fool-proof documentation strategy to back you up, your documentation journey will be a guaranteed success.

Ready to make your processes start working for you (and not against you)?

[Book demo](#)



Download our Excel Template here to get started today

