



# SOP Document Management: Choosing the Right Software

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When it comes to how you and your team are operating on a daily basis, there has to be a unified structure to maintain efficiency, productivity, and keep errors to a minimum.

Standard Operating Procedures (SOPs) do just that — they are an integral part of streamlining your businesses to maintain and improve daily processes. Most likely your team is striving to do the right thing

everyday, but their version of what is right may not be in line with what you know to be best for your daily operations. Developing organization-wide SOPs are not just about productivity: They're also key to *greatly* reducing your risk of errors that can be detrimental to your business. Specifically, defining exactly how a task or procedure is performed makes sure you leave no stone unturned in the process.

In order to maintain and utilize your SOPs properly, your team needs easy and efficient access to them *and* simple procedures to update them. Simply put, the traditional paper-filing method for SOPs no longer measures up to how business is done in 2020. And switching to any digital filing method isn't the answer, because not all document management systems provide the right features your business needs.

Knowing which document management software to choose for handling your SOPs isn't an easy decision, so we wrote this blog to help you understand the important pieces of document management for SOPs and how to know you're making the right switch to improve your training and procedures.

## Document Management for SOPs

Regardless of how extensive your Standard Operating Procedures are, you need to strategically plan how to store it. It's not just about where it lives, but about how you use it, update it, and forward it on. We are a broken record when it comes to paper filing — with so many affordable and robust digital filing resources out there, there's no business too small to take advantage. Even if you have one small manila folder of SOPs, how can you efficiently share and use it in 2020, with most of our workforces not able to work from the office? And for the businesses with offices filled to the brim with SOPs, how do you find the one you're looking for in a timely manner?

Implementing a document management system to manage your SOPs is the only answer — with some exceptions. Let's take a look at the

four most important features you need to properly digitally manage your SOPs.

**Proper Indexing.** Without a streamlined indexing process, your SOPs can easily become jumbled and disorganized. This makes new employee or process training extremely difficult, and makes updating those SOPs a time-intensive task. A clear and concise indexing process gives you the organized SOP file you've been dreaming of. Optix gives you the power to configure and design your indexing process in a way that's best for *you*, which makes the document management system that much more powerful.

**Advanced Search Capabilities.** Some document management systems only give you the capability to search within certain folders or search for specific titles. And sometimes, that doesn't cut it. When you need an SOP but can't remember the exact name, you'll be out of luck. With advanced search capabilities like those found in Optix, all you have to remember is a few words within the SOP and Optix will pull up all the available SOPs with that specific phrase. Let your document management do the thinking for you — so you can get back to your task.

**No Coding Required.** While it is important to have a configurable document management system so that it can be tailored to fit your processes, not everyone has the brain of a coder. A document management system like Optix was built to fill that gap by providing the power of configuration without the need for extensive programming. [Optix's Application Generator](#) gives our clients the ability to build screens and documents on their own with minimal training. It's incredibly intuitive and easy-to-use, so users can add, remove, and update SOPs as needed at any time. Who needs IT when you have Optix?

**Workflow Capabilities.** Building your SOP file isn't a job fit for one person. Each department, each process, and each individual task

could have someone completely different in control of it — but you'll always need to have leadership's eyes on it to make sure it fits under the entire organization's umbrella of procedures. If your document management system has workflow capabilities like Optix, you're able to set up flows that can automate the approval process of a new or updated SOP without any work on the users end. Once an update is made, it's sent directly to the user approving it. Once it's approved, it's marked as done and available for use. This greatly reduces the risk of using outdated SOPs or non-approved SOPs that can damage business processes.

## Getting the Most Out of Your Document Management System

A document management system like Optix isn't just built for SOPs, it's built to handle *any* document and workflow need within your business. In fact, Optix allows our clients to use the system for SOPs and other department applications **at no extra cost**. Think of the possibilities when all of your department's documents, including customer service, accounting, shipping, and more, are held in one unified location. Searching, retrieving, and updating becomes seamless as you manage your entire organization within one easy-to-use platform.

Standardizing your procedures is an integral part of improving the productivity and efficiency of your business — but organizing those SOPs can be a different story. With so many rules and regulations to follow, for any type of organization, a well indexed and organized SOP file can make for more streamlined training and audits. [Contact us](#) today to learn more about SOP document management and how Optix can transform your document processes throughout your entire organization.