

Ebook

The Ultimate Guide to SOP & Process Documentation

Why, what, and how to unlock the next level of growth in your business with SOPS & systems.



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Why would you write an eBook on SOP & Process Documentation?

That really isn't the question, is it? No.

The question is why would you want to read an eBook on SOP and Process documentation? The truth is that without it, you could just be shooting in the dark.

Let me give you a real-life example of how having a solid playbook can lead to global success. Meet Ray Kroc, the man who turned a small fast food joint called McDonald's into a global empire. Ray understood the importance of having a consistent and efficient process in place to ensure quality and speed of service. He was so committed to the concept of standardization that he created a 200-page operations manual, which he called the "McDonald's Bible."

This manual outlined every aspect of the McDonald's operation, from the size of the fries to the exact amount of ketchup to use on a burger.

By having this level of detail in place, McDonald's was able to replicate its success across thousands of locations, ensuring that every customer received the same quality food and service, no matter where they were in the world.

The result?

McDonald's is now one of the most recognized and successful brands in the world, with over 38,000 locations in more than 100 countries.

So if you want to follow in Ray Kroc's footsteps and take your business to the next level, you need to have a solid SOP and process documentation strategy in place.

And that's exactly what our eBook will teach you!

Here's to **unlocking the next level of growth** in your business.



Gary

CEO and co-founder, Whale



“I’ve had many clients approach me with the issue that they **spend so much time onboarding and training employees**, repeating the same process or procedure, ten, twenty, or even hundreds of times. **Through process documentation, they get back time** for other duties and personal plans they find equally important.”



Adi Klevit

CEO & Founder BSCG

Introduction

A Non-Boring & Real Definition of SOPs





What exactly is a SOP?

Standard Operating Procedures (SOPs) are the must-have set of instructions that outline exactly how to run a task. Whether you're showing how the hiring process works or how to manage entire projects, a clear SOP can help unify tasks so outcomes are the same across every team.

SOPs can cover a wide range of activities, from manufacturing and production processes to administrative tasks, customer service protocols, to HR and safety procedures. They are usually created by subject matter experts and can be updated or revised as needed to reflect changes in the process, technology, or industry standards.

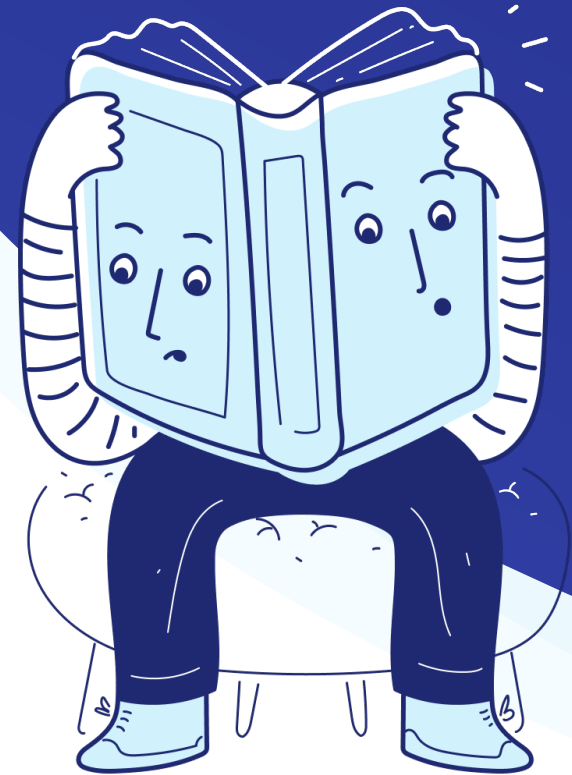
In essence, SOPs provide a clear and detailed roadmap for how to carry out a task or process in a way that is reliable and standardized, which helps to minimize errors, reduce time spent on tasks, reduce variation, and ensure that the end result meets a specific level of quality.



Disorganized processes are one of the top 10 employee pain points, with a whopping 67% (Nintex) of employees saying their company's broken processes prevent them from maximizing their potential.

Introduction

Let's Look at Some Terminology





Okay we now understand SOPs but what is a procedure? How is it different? What is a policy? We know it can be confusing! So here's a little clarity on what's what.

Process

A process is a series of tasks that are done or required in order to achieve a specific goal. Typically, processes are higher-level documents devoid of too much detail. Here it's all about the BIG picture!

SOPs & Procedures

SOPS and procedures are the same; they are written instructions that describe how to carry out a task in a specific order in order to achieve an end result.

Workplace Instructions

Workplace instructions describe the actual work to be performed. They include specific instructions and additional guidelines necessary to complete the task. For example bullet points on how to answer a customer query or how to complete a form.



SOPs and procedures are important tools for ensuring consistency, efficiency, and quality in organizational activities, and they help to promote best practices and standardization across an organization.



Process

Process is the BIG picture WHAT. It's a high-level document that details the business process and an overview of why you exist or why that process exists.

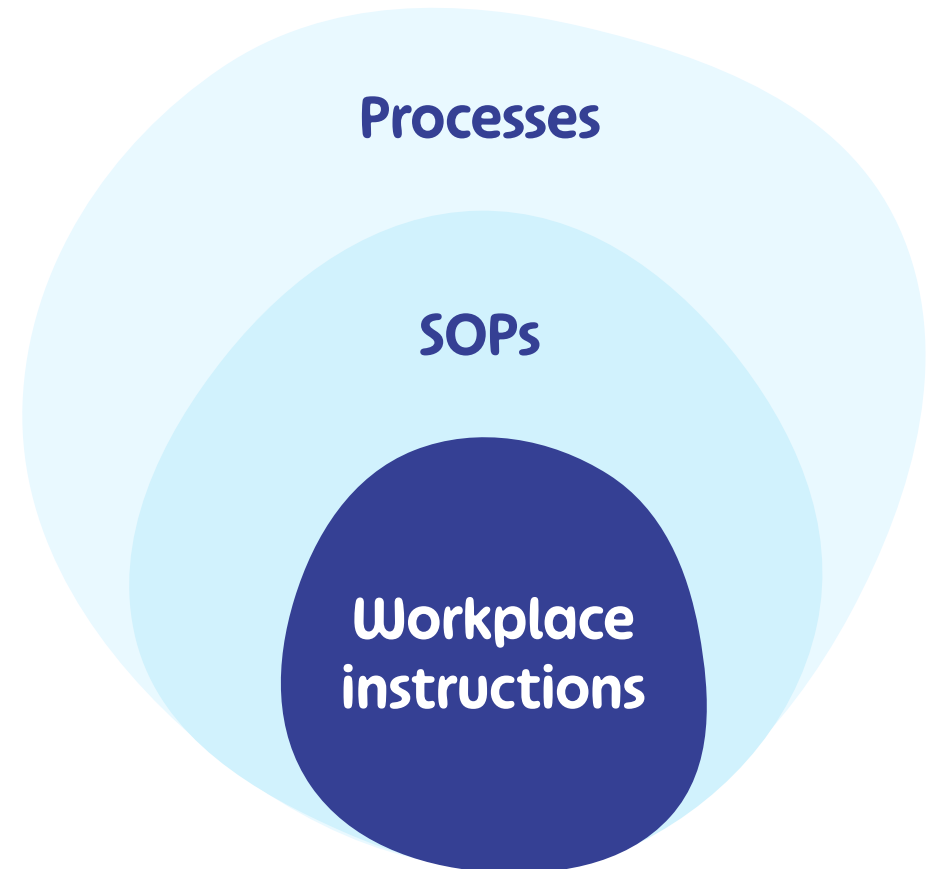
SOPs & Procedures

Details the HOW. Also called Standard Operating Procedures, SOPs are the 'HOW to do' implemented across every department, ensuring that work is completed correctly and efficiently.

Workplace Instructions

These are the additional HOW TO.

A work instruction is a very specific written document that provides clear and precise steps to carry out a single task.





“For entrepreneurs and leaders who want **to be truly free**, strengthening their **business’ process component** is essential. When business owners and leaders are **stuck in the day-to-day** helping employees do **simple tasks** or **cleaning up the mess** when that doesn’t happen, they have **no time or energy** to invest in creativity, innovation or strategic growth **initiatives that will take them and their business to the next level.**”

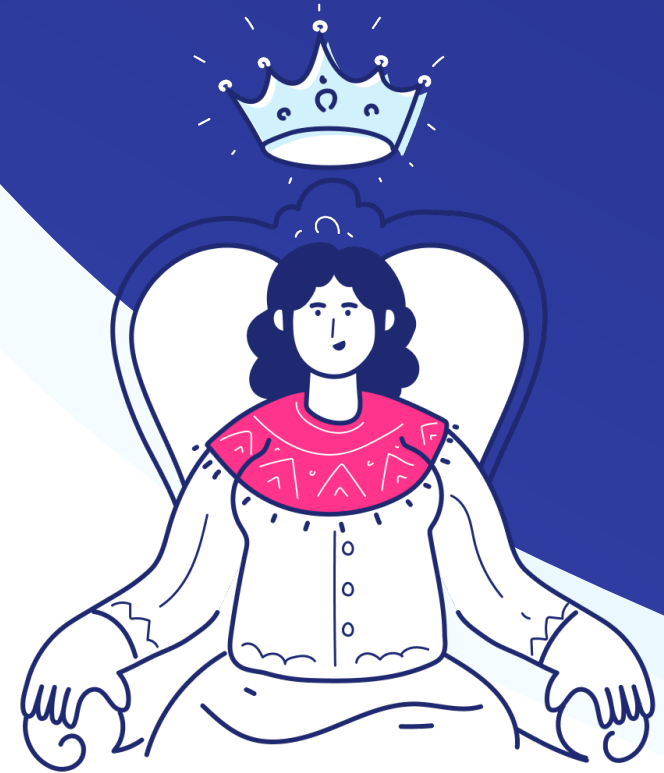


Mike Paton

Co-author of “Process!” and EOS Implementer

Theory in Practice

The Top 10 Processes EVERY Company Needs?





Here are the TOP 10 processes every company needs!

Company documentation refers to any written or recorded information that is created or collected by a company to support its operations, processes, and decision-making.

It can include a wide range of materials, such as:

1. Policies and procedures
2. Contracts and agreements
3. Financial records
4. Human resources documentation
5. Training materials
6. Marketing and sales materials

When most people hear about company documentation, they often think about a large corporation with hundreds of employees and pages and pages of documented processes.

But company documentation is for every business that really wants to unlock growth and scale their business in the most efficient manner possible. Company documentation also doesn't need to be lengthy or complex!



- 
- 1 Recruitment and Hiring Process
 - 2 Employee Onboarding and Training Process
 - 3 Sales Process
 - 4 Product Development or Service Provision Process
 - 5 Finance and Accounting Process
 - 6 Customer Service and Support Process
 - 7 Inventory and Supply Chain Management Process
 - 8 Marketing and Advertising Process
 - 9 Quality Control and Assurance Process
 - 10 Human Resource Management Process



Theory in Practice

12 Reasons WHY You Need SOPs





Once upon a time, some new guy on the development team asked for the relevant SOPs on launching a new product release.

And the founder rolled his eyes because they'd never had it written down.

Besides, everyone knew how to do it anyway. So people just carried on, and as more people joined the team, they asked the old team members for relevant information.

But the problem was that information was lost or not shared consistently, and the team began to experience the familiar chaos that correlates to scaling without a system. And the new guy on the development team floundered.

We know scaling a business is tough. There's A LOT to deal with, but did you know process documentation could be helping with many of the challenges you might be facing?



1

Leaky bucket syndrome

When a business grows and you have nothing documented, information is transferred verbally and often sporadically. This means that knowledge is often lost in the process. After some time, so much information is lost, that, just like a leaky bucket, it becomes detrimental to the business.

2

Competition

Documenting processes and SOPs can help you deliver a more consistent and seamless customer experience. which can give you a competitive edge in the marketplace

3

(In)consistency

Remember when you went out to eat and had a great meal, but the next time you went back, it simply wasn't as good? Maybe they hadn't followed their usual process. If you don't document your business processes, you're more likely to experience inconsistent delivery and service. Just like that restaurant!



4

Efficiency

By documenting your processes and SOPs, you can identify inefficiencies and areas for improvement. This can help you streamline your operations and increase productivity, which can give you an edge over competitors who may not have optimized their processes.

5

Employee engagement

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

6

Continuous improvement

Documenting processes and SOPs allows for ongoing evaluation and improvement of processes. It enables businesses to identify areas for improvement and implement changes to enhance efficiency, productivity, and profitability.

7

Faster ramp-up time!

SOPs are an essential tool for training new employees. Having clear, documented processes allows new hires to quickly get up to speed quicker on how to perform tasks correctly.

8

Delegation

The one reason you wanted to hire a great team is to help you do great work. But you can't do great work if you're trying to do it all alone. SOPs and process documentation can help you to delegate tasks more easily AND know that they'll be done right!

9

Valuation of your business

Investors love SOPs and processes because it means the company has not only found its secret sauce, but it's found a way to scale! Your business's valuation is likely to be higher with proven processes. It's all about being process-driven versus being founder-driven. If a business's success is founder driven, then when the founders leave, the business loses its value. This doesn't happen in a process-driven business which retains its value even when founders exit.



“When we started, we couldn’t see the point in **documenting our processes**. It was boring, and besides, I needed to put time into growing the business. For a while, it worked! But **as we hired new team members, it turned into chaos**. Documenting our processes REALLY helped us get clear. As a result, we could **train our team more easily** and **new hires got up to speed in no time!**”



Koen Lepez

CEO of Direct



10

Problem solving

When a problem occurs, following a documented process or SOP can help identify the root cause of the issue. This allows the business to address the underlying problem rather than just treating the symptoms of the problem.

11

Team collaboration

Documented processes and SOPs facilitate collaboration and communication between different departments and teams. This can help to bring together different perspectives and expertise, which can lead to more effective problem-solving and continuous improvement.

12

Continuity & deep smarts

Investors love SOPs and processes because it means the company has not only found its secret sauce, but it's found a way to scale! Your business's valuation is likely to be higher with proven processes. It's all about being process-driven versus being founder-driven. If a business's success is founder driven, then when the founders leave, the business loses its value. This doesn't happen in a process-driven business which retains its value even when founders exit.

AND not to mention the fact that SOPs lead to

- Increased output of staff
- The ability to attract and retain top talent
- Increased chances of success when franchising a business
- Increased peace of mind
- And the ability to focus on strategic projects as opposed to functional repeatable tasks.

Ace your SOP & Process Documentation with Whale



20% more!

A study by Accenture found that companies that implement strong operational processes and procedures can achieve 15-20% higher shareholder returns than their peers.

Theory in Practice

Overcoming Common Challenges





So having SOPs in place is a good idea...

But I don't have time

We hear this all the time. And to be honest, we get it! We're a scaling team and there are always a million things to be done BUT at some point you have to decide what activities create exponential growth and impact. The thing is, if you don't have time to do it right, when will you have time to do it over? (Coach John Wooden)

But we've always done it this way

Isn't it great when things are going well in a business? It seems like things are flowing, customers are happy and everyone in the team is getting along.

The problem is that this doesn't last long simply because a business doesn't work that way. Scaling is a dynamic environment with challenges that arise at each step of the journey. Documenting your SOPs and processes will go a long way to solving problems and promoting innovation.

And I don't know where to start

As a scaling team, it's natural that team members wear many different hats. So it's pretty natural to feel overwhelmed at the beginning, especially if you don't have anything documented.

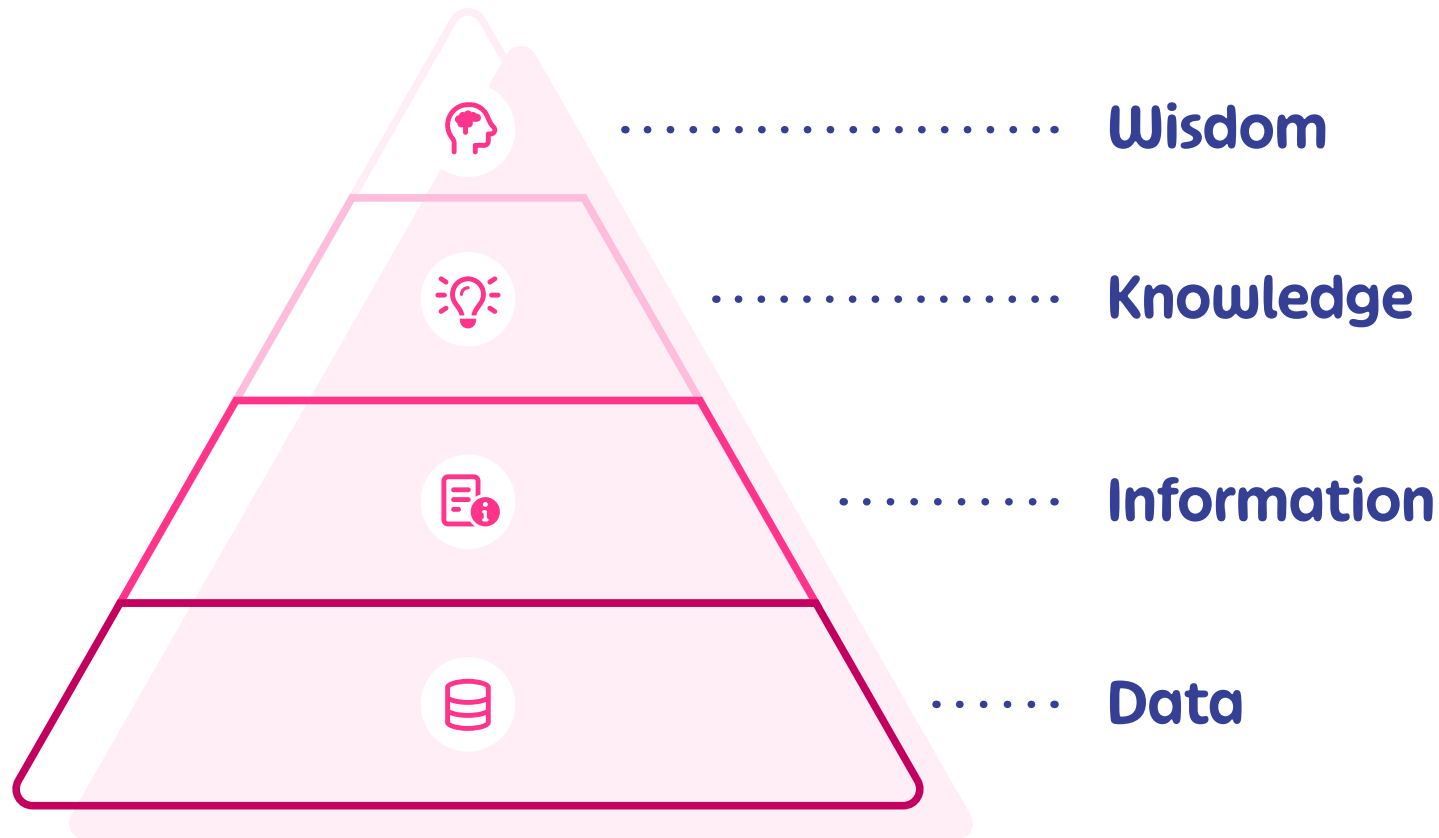
There are two SUPER easy ways to overcome this;

1. Why not connect with an expert partner to help you manage the process and help you create the content you need?
2. AND assign subject matter experts in the business and document only 20% of the major steps that get you 80% of the results. Remember, you don't need to do a lot, just document what's needed to start with.



Your company wisdom matters

You can't become a wizard or master your craft until you have the basics in place. To put this into business speak – you won't be able to utilize company knowledge as a competitive asset until you've created a knowledge management process within your organization.





“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

CEO & Co-founder of Whale

Theory in Practice

3 Stages of Business Growth and Process





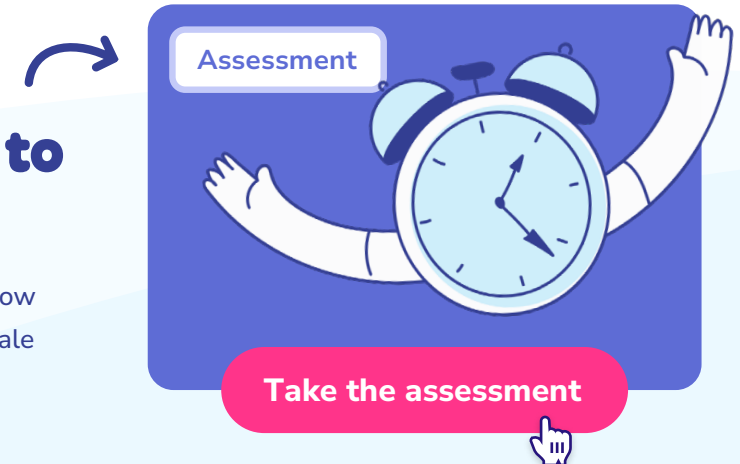
Process is a crucial indicator of readiness to scale. Simply put, the time a business spends onboarding new team hires or micromanaging current team members leads to a lack of focus on growth-oriented tasks.

Putting out fires, and working in an unstructured setting costs time and money, decreasing operating efficiency and not to mention consistency. So we know process is a winning formula!

BUT not all businesses are in the same stage of growth. This means that how one company applies process may need to differ depending on the stage of growth and scaling. Here's how to recognize where you are and what needs to change;

Take the readiness to scale assessment

Want to scale your business but don't know where to start? Take our Readiness to Scale Assessment to find out!





Starter

Teams of 5 - 25

Characterized by:

- Attracting new team members
- Sharing learning so new team members can hit the ground running
- Laying a foundation for improvement

Goal

The first goal here is to help new team members hit the ground running

Growth

Teams of 25 - 100

Characterized by:

- Rapid hiring of new team members within existing teams
- Onboarding new team members concurrently
- Bedding down the product and business model

Goal

The goal here is to amplify your efforts in the business by growing in team size

Scaling

Teams of 100+

Characterized by:

- Market and/or product expansion
- Maintaining customer experience through growth
- Entrenching analytics into every part of the business

Goal

The goal here is to scale & make sure the consistency remains AND that the business keeps increasing in value



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

Gary Vanbutsele

CEO & Co-founder of Whale

The Ultimate Growth Framework

Your Ultimate Growth Framework





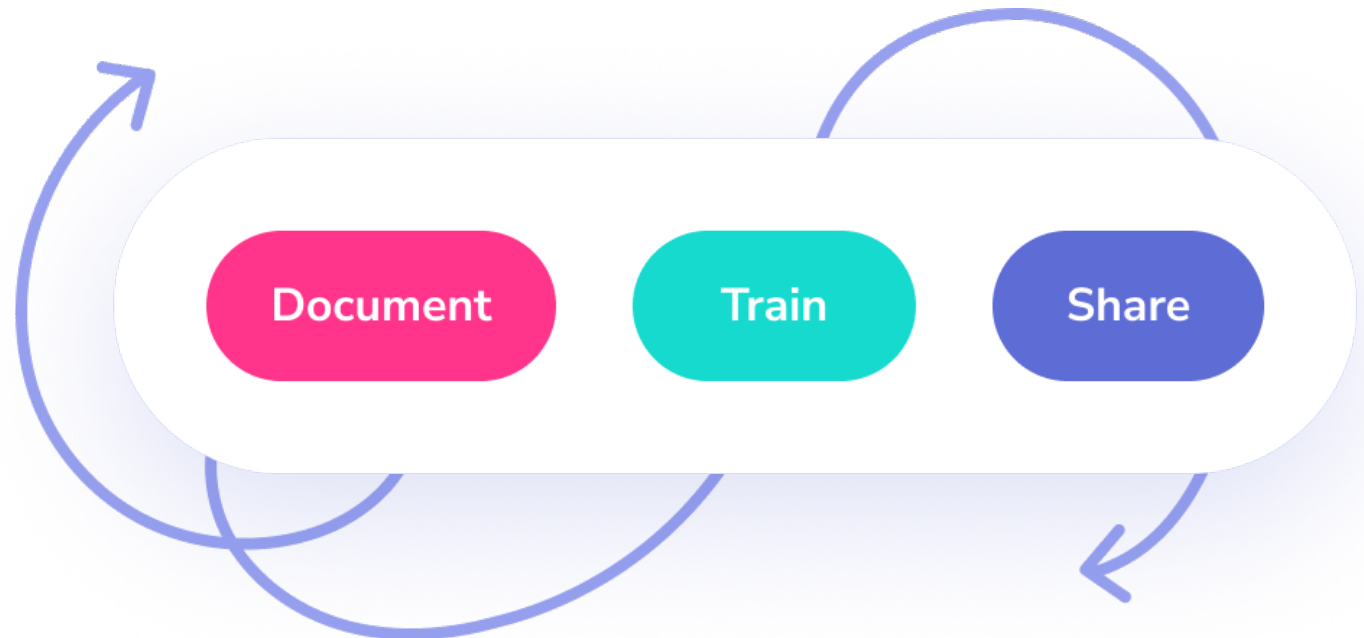
Want to fix that leaky bucket syndrome, ramp up your teams faster and increase efficiency? Welcome to the ULTIMATE growth framework!

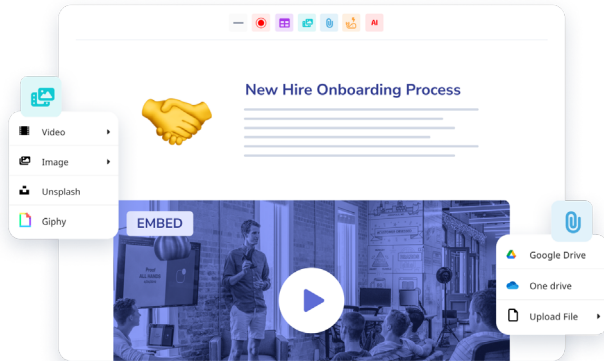
The Powerful Playbook Process™ will help you create traction in your business. We developed this three pillar flywheel approach because as you embark on the process, you'll grow and gain velocity in your business.

The more you document, the better you'll be able to train your teams and you'll be able to measure the continuous improvement in your business.

It's all about promoting a culture of innovation and continuous growth.

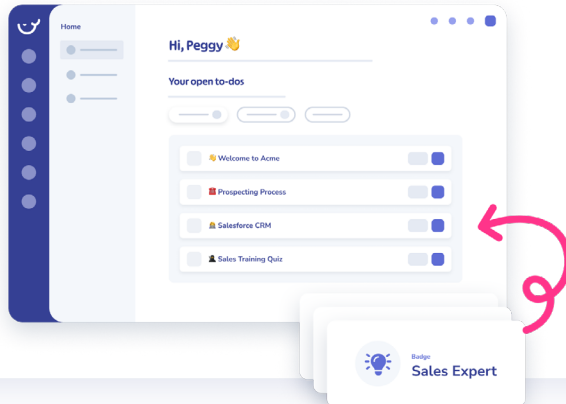
The Powerful Playbook Process™





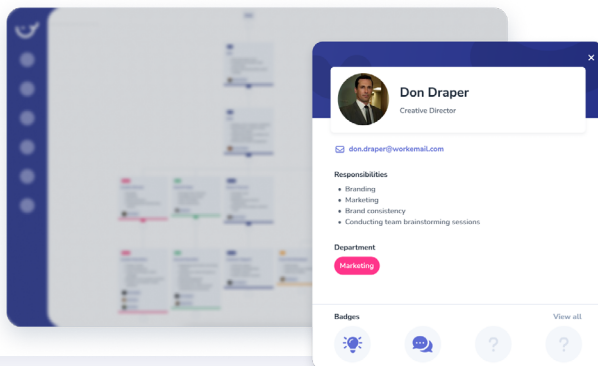
Document

Create killer SOPs and process documentation based on your winning processes



Train

Train new team members and upskill current team members to get everyone on the same page



Share

Measure what impact knowledge is having on your business and where opportunities lie for continuous improvement.



“The clients I work with typically have their **processes documented in one form or another**. The challenge they face is having an **effective way of sharing information** that is digestible and easy to access. Solutions like Google Drive work in the early days of a company but quickly prove to be insufficient for organizations that are growing rapidly.”



Xavier Chang

XC Consulting

The Ultimate Growth Framework

How to Document!





The 3 steps to creating effective playbooks, processes & SOPs

Documenting your processes is easier than you think! It's simply a matter of identifying what SOPs and processes to document, documenting and organizing the content.

1. Identify

2. Document

3. Organize

Use these methods to identify where to start:

The New Hire Ramp Up

Think what topics will help your new hires ramp up more quickly?

The Delegate Matrix

If you were to hand over tasks to another team member, what tasks would those be?

The Team Survey

Think about what your team requires most to improve their game.

The EOS Core Process

Map the high Level key processes in your business for clarity



Feeling overwhelmed?

Focus on low-hanging fruit — simply list the repetitive questions from employees and common issues and complaints from customers.



Now it's time to get documenting

Nike was right. Just do it! BUT remember these helpful basic principles;

- ✓ 50% is better than 0%
- ✓ Focus on visual SOPs and add images, video and even GIFs to make it engaging
- ✓ Focus on common and repeatable tasks, not exceptions
- ✓ Use your company's common terminology
- ✓ Make the crucial points evident to the reader. Don't go into the details too soon!

See how this company shares knowledge across 8 locations



Time savers to help you document!

Remember when you said you were worried about how much time it would take to document your processes? Well, here are 3 time saving methods to help you document faster;

1 Use templates to create consistency

Kickstart your documentation with 100+ pre-built SOP and policy templates on Whale or simply search the web for the template you're looking for.

2 Use the screen recorder method

Why not simply screen-record a video? You can do this directly in Whale or use platforms such as Loom. Once it's done, it's done! Simply publish it and share.

3 Use the junior transfer method

Have a new team member starting? As you're helping them get started, simply document as you go.



How to organize your documents

Proper documentation organization can help manage your company's knowledge and make it easily accessible to employees, making it easier to train new staff and pass on institutional knowledge. Organized documentation also increases efficiency allowing employees to find the information they need quickly, improving productivity and efficiency in the organization.

1. Use a KISS mindset

Keep things simple. Think about how you would organize your files if your team were in just one office. Then do the same digitally.

2. Define access levels

Give documentation access to team members who need it. Control which documents a user group can view or modify to make it easier for everyone.

3. Use a certain hierarchy

Grouping certain content together and organizing your company content in a hierarchy makes for easy access and collaborations between teams.

4. Assign ownership & review regularly

Assigning ownership and regular review of documents will ensure that company documentation is kept up to date, ensuring company efficiency.

Did you know?

- Whale now also features AI Assist to help you create processes in minutes!
- Whale's Chrome extension means that teams have access to information when they need it and where they need without ever having to leave the application they're working in.



Actions steps

Set some deadlines and with your subject matter experts, block out time to identify, document and organize your team's process documentation. With a team effort, you'll have them done in no time!





“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.”

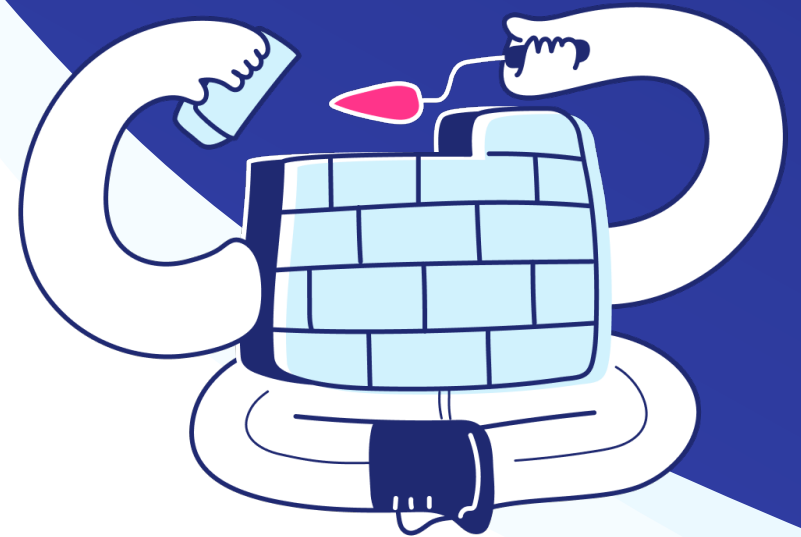


Jason Green,

Professional EOS Implementer, Workcraft

The Ultimate Growth Framework

How to Train with SOP & Process Documentation





Why implement training?

Continuous Learning wins

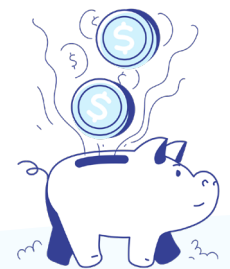
By continuously looking for ways to improve processes, systems, and products, a business can stay ahead of the competition and remain relevant in an ever-changing market. This can help to drive long-term success and sustainability for the business.

The new world of work requires continuous improvement and daily micro training.

And Gen Z wants to start now

According to LinkedIn's Workplace Learning Report 2021, Gen Z wants to learn their way up the career ladder—and smart companies are providing the rungs.

Though newcomers to the professional world—the oldest Gen-Zer today is just pushing 24—Gen Z is highly motivated to grow their careers, with 76% seeing learning as the key to their advancement.



218% more!

A study conducted by “The American Society for Training and Development (ASTD)” found that companies that offer comprehensive training have a 218% higher income per employee than those with less comprehensive training.

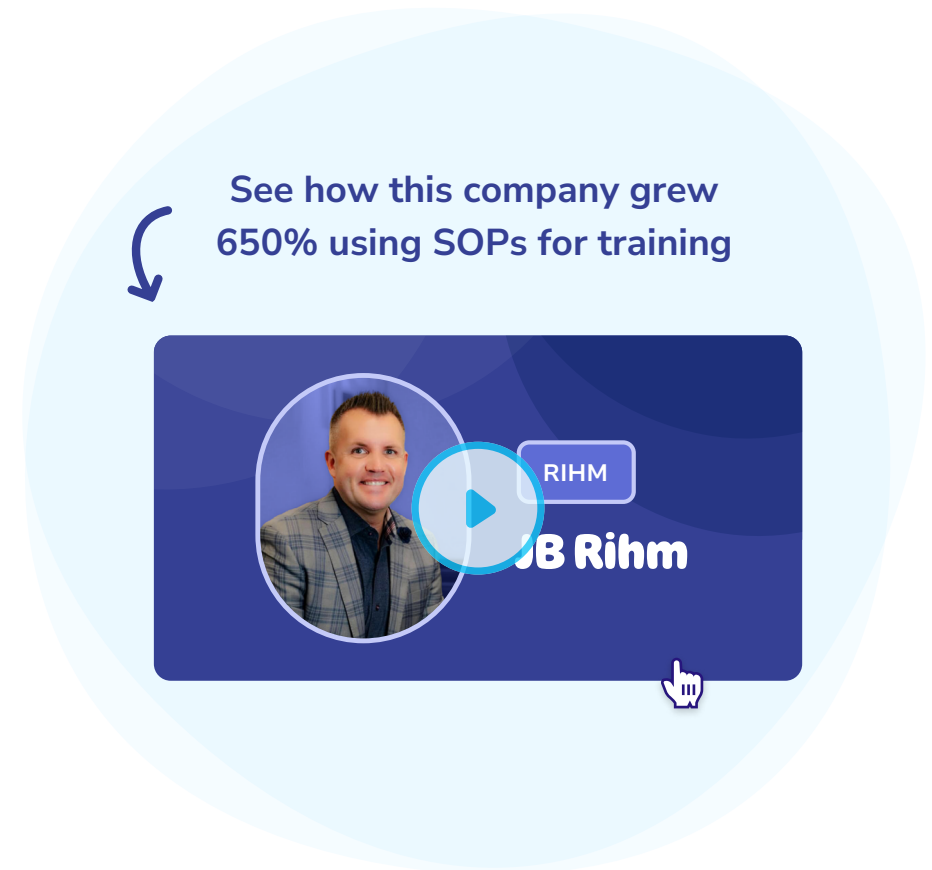


Knowledge is the most valuable asset

Have you ever wondered why Nokia lost the game to Apple? The bottom line is that Nokia lost out because it failed to learn, and it failed to learn fast. Continuous learning keeps your business competitive and improves employee retention and engagement, thereby improving productivity.

To capitalize on company knowledge, there are three types of training a business needs to consider;

- New employee onboarding
- Ongoing Employee Training
- Transitional Training





Essential training your employees need to become top performers

Onboarding

Onboarding your new members of staff is vital to ensure they are aware of the company's purpose, processes, and goals and are fully prepared to fulfill their role. Train new team members with an employee handbook covering topics like company story, mission, values, and policies.

Specific training

Whilst it may seem obvious, continuing a well-structured training routine for your staff that is specific to their role throughout their employment can have a hugely positive effect on their abilities, confidence, and likelihood to remain with the business. Utilize process, SOP, and tool training for their specific position.

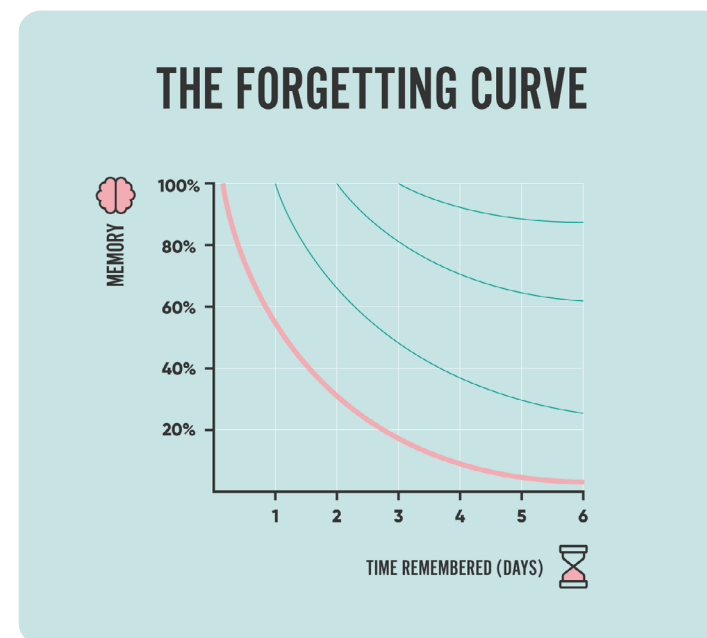
Reinforcement

The statistics on learning retention can be alarming if you take them at face value. Some studies report that up to 70% of knowledge is lost within 24 hours of learning. Retraining people regularly can ensure long term retention and compliance.

70% loss!

Some studies suggest that humans forget approx 50% of new information within an hour of learning it. That goes up to an average of 70% within 24 hours.

Avoid the loss of knowledge and combat the forgetting curve by learning with continuous reinforcement.



Source: <https://www.learnupon.com/blog/ebbinghaus-forgetting-curve/>



Assess, reward and leverage

Netflix for training!

Everyone loves Netflix! It's great entertainment and easy to watch! Imagine if training material was made and delivered on the same basis? Everyone would want to learn!

Use video and the principle of entertainment to make training material more enjoyable and easier to remember.

Assess and reward knowledge!

Remember that forgetting curve? You can overcome knowledge loss through reinforcement. Use quizzes to;

- ✓ Assess knowledge and focus on key areas of learning
- ✓ Motivate learning
- ✓ Trigger memory recall improving knowledge retention
- ✓ Identify knowledge gaps

Reward in-quiz-ativeness in your team! The more fun your team has learning, the more likely they are to retain knowledge.

Make training accessible



Make documentation accessible with tech

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.

Working in the flow

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.



“I have observed hundreds of companies of great people doing things right, just **not necessarily doing the right things**. By systemising your company’s recipes of success, you’ll bake consistency, predictability, scalability, efficiency, and ultimately profitability into the core of your business. When **effective process** drives the work, you’ll **move faster**, make **less mess**, and ultimately **get the things you want done**, done the right and best way, every time.”

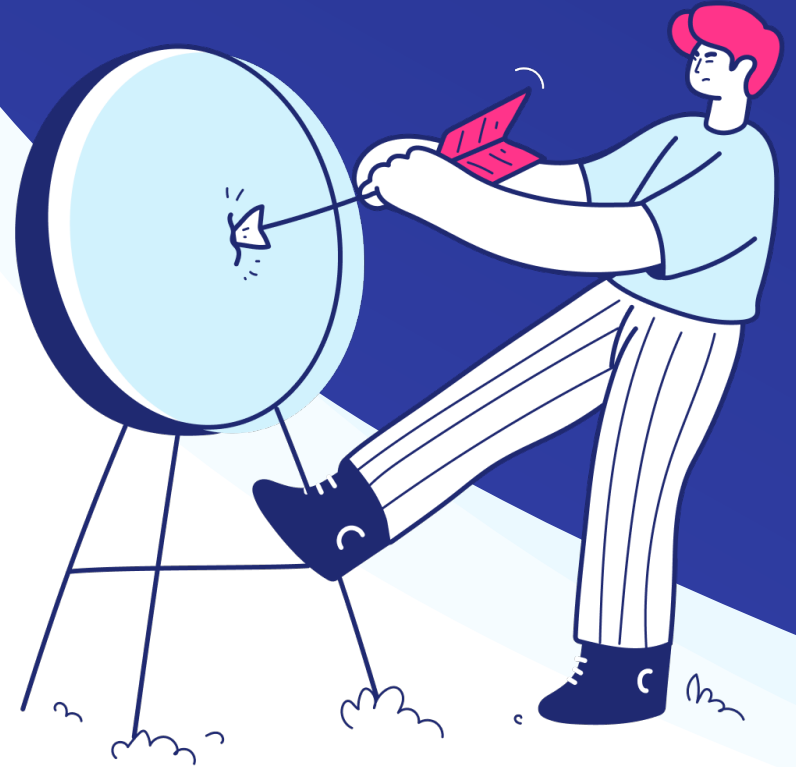


Dean Breyley

Community Leader (Europe) at EOS Worldwide
& Expert EOS Implementer

The Ultimate Growth Framework

How to Measure SOP & Process Documentation





Mind the gap!

Have you ever been on the underground in London? All day long you're reminded to 'mind the gap' between the train and the platform. By applying this thinking in your business with respect to knowledge, you could avoid some massive shortcomings.

Here are 7 gaps that impact company performance

1. Documentation Gaps indicate that this topic has not been documented

→ To solve this, add new topics on regular basis based on feedback and questions.

2. Accessibility Gaps indicate that the person does not know where to look

→ To solve this, educate and indicate where specific information lives and connect to other places.

3. Searchability Gaps indicate that they are not finding relevant items

→ To solve this, review terminology and analyze search patterns.

4. Completion Gaps indicate that the person is not completing the mandatory training assignments

→ To solve this, hold team members accountable in team meetings or during employee reviews.

5. Habit Gaps show that the person is still using old methods

→ To solve this, communicate frequently, and incentivize habits with gamification.

6. Review Gaps indicate that the documentation is not being kept up-to-date

→ To solve this, assign ownership within the team and set review cycles.

7. Comprehension Gaps indicate that they have not fully grasped the material they are reading

→ To solve this, revise your documentation with additional (supporting) resources and don't forget to frequently reinforce learning.



Do you have a system that tells you what team members are searching for? Once you know what your teams are searching for, you can use the data to spot gaps in your knowledge base.



Embracing a culture of continuous improvement

Embracing a culture of continuous improvement requires a systematic approach that incorporates the three pillars of assigning ownership, capturing feedback, and reviewing periodically.

1. Assign ownership

The first step is to assign ownership of the SOP and process documentation to a specific individual or team. This person or team should have the necessary expertise and authority to lead the improvement effort. They should also be responsible for ensuring that the SOPs and process documentation are up-to-date, accurate, and effective. By assigning ownership, you create a sense of accountability that motivates people to take ownership of the process and drive improvement.

2. Capture feedback

The second step is to capture feedback from stakeholders who are involved in the process. This feedback can come from employees, customers, suppliers, or other stakeholders who interact with the process. By gathering feedback, you gain valuable insight into how the process is working, what challenges people are facing, and what improvements can be made. Feedback can be collected through surveys, focus groups, interviews, or other methods that are appropriate for your organization.

3. Review periodically

The third step is to review the SOPs and process documentation periodically to ensure that they are still effective and relevant. This review should be conducted by the person or team who owns the process, and it should involve a thorough examination of the process and its associated documentation. The review should identify any areas that need improvement and make recommendations for changes that will improve the process.



By following this 3-pillar model, you can create a culture that fosters innovation and drives organizational success. This approach allows you to identify areas for improvement, make necessary changes, and continually optimize your processes to achieve better results.



SOP Mastery - Best practice for continuous improvement

Here are three practical steps to putting continuous improvement into practice.

At the end of the day it isn't about SOPs, it's about unlocking the next level of growth in your organization. But how?

1. 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.

2. Ask for feedback

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

3. Set review dates

Specify when your process needs 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.



Pro tip

Track who is responsible of reviewing what process, so when that person changes roles or jobs it can be easily re-assigned to someone else.

Making It Work

10 Mistakes to Avoid in SOP & Process Documentation





In our time we've seen a few things and we've seen a lot go wrong. Save yourself the time and having to do things over again by skipping these 10 common mistakes.

- 1 You see a mountain instead of a molehill
- 2 You forget to explain the why
- 3 You're not getting feedback from those who execute
- 4 You only let managers write your procedures
- 5 You believe processes stifle creativity
- 6 You're not assigning ownership
- 7 You are not leveraging documentation to its full potential
- 8 You think people will dig into folders to find what they need
- 9 You are not utilizing the benefits of technology
- 10 Your documents are boring and employee 'un'friendly



Watch the webinar

Want to optimize the documentation of your SOP & Process Documentation? Watch the webinar with Whale's CEO Gary Vanbutsele.



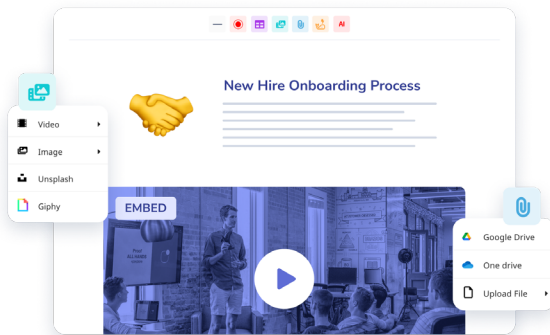
Making It Work

Your Ultimate SOP & Process Documentation Checklist



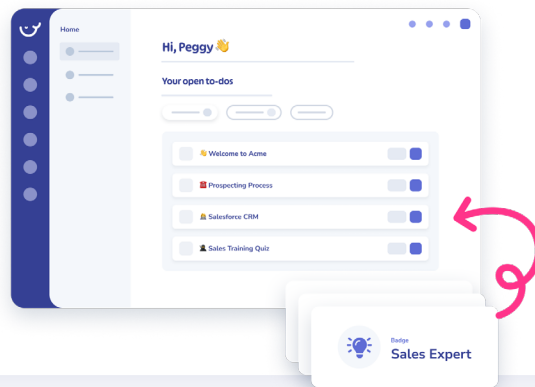


Bring your documentation to life in WHALE



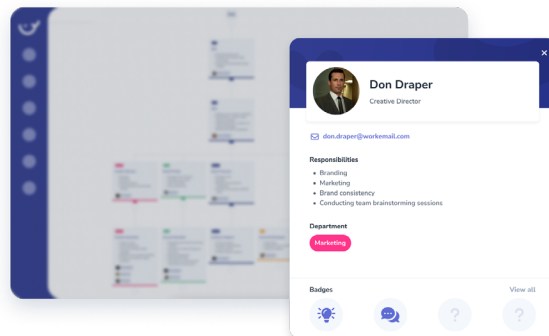
Document

- ✓ Use the 80-20 rule to identify the essential processes to document
- ✓ Document core process using time saving methods
- ✓ Organize documentation for scalability



Train

- ✓ Identify essential training
- ✓ Counter the forgetting curve with reinforcement and the Netflix for training effect
- ✓ Assess and reward knowledge



Share

- ✓ Identify & close the gaps
- ✓ Continuously improve



Use Whale to master SOP & Process Documentation

Document

Save time documenting

- ✓ AI Assist™
- ✓ Gallery
- ✓ GIF & image library
- ✓ Templates
- ✓ Screen recorder
- ✓ Import documents

Use tools such as Whale's unique AI Assist™ technology to get your SOP & Process Documentation done, organized and shared in minutes.

Train

Train and amplify the value of your playbooks

- ✓ Assignments
- ✓ AI Quizzes
- ✓ Search facility
- ✓ Training flows
- ✓ Web extension
- ✓ Mobile app

Turn your SOP & Process Documentation into training manuals through quizzes and assignments to deliver a consistent and fun learning experience.

Share

Measure & gain insight

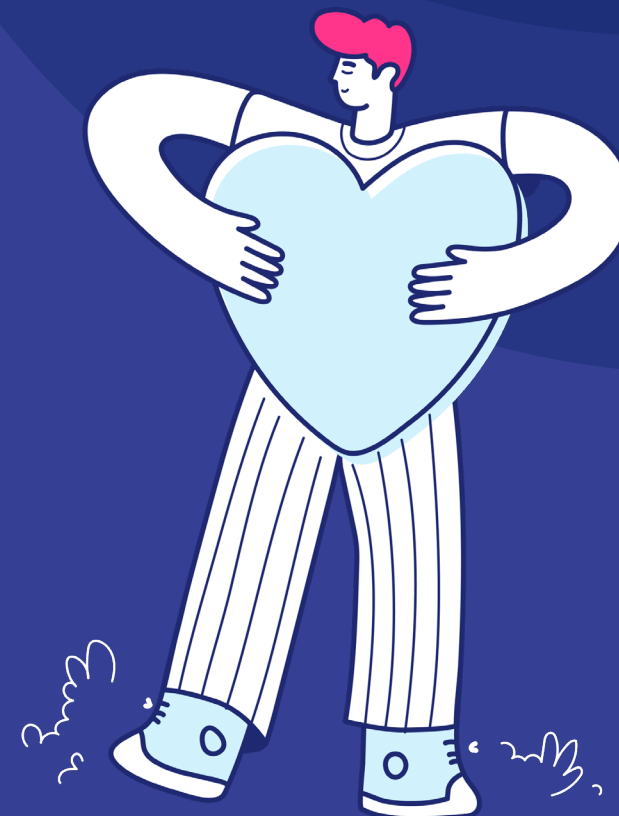
- ✓ Ask Alice AI
- ✓ Views
- ✓ Completion
- ✓ Scores
- ✓ Reviews
- ✓ Org chart

Analyze team performance and close knowledge gaps so you can ensure everyone is always on the same page with features like questions, scores and views.

Want to put it all into action?

Unlock growth with Whale and get set up in minutes

Convinced? Grab your colleagues and let's talk. Join hundreds of other companies who've been successful in onboarding, training and setting their team up for success on our award winning platform!



Discover the product

