

# Standard Operating Policies & Procedures

## Even SOPs Need a Standard Way to Manage Them

Communicating new or revised Standard Operating Policies and Procedures (SOPs) is an important and necessary function within any organization. Unfortunately, sometimes a SOP is sent out quickly without the appropriate time, attention, and overall approval which then leads to the wrong information being sent out. Inaccurate information, missed departments, and out of order procedures can affect the quality of the SOP and lead to problems when trying to implement and use them.



ClearCadence understands how important it is to be able to create and distribute quality SOPs throughout the organization. That's why we developed **ClearNotice for Standard Operating Policies & Procedures**, a configurable workflow solution that allows organizations to closely manage, track, collaborate and approve SOPs. By utilizing a dynamic approval cycle along with the appropriate parties involved with the proper permissions, ClearNotice helps ensure that no SOP goes out without going through your company's authorization channels.

## Collaborate, Track and Manage Your SOPs

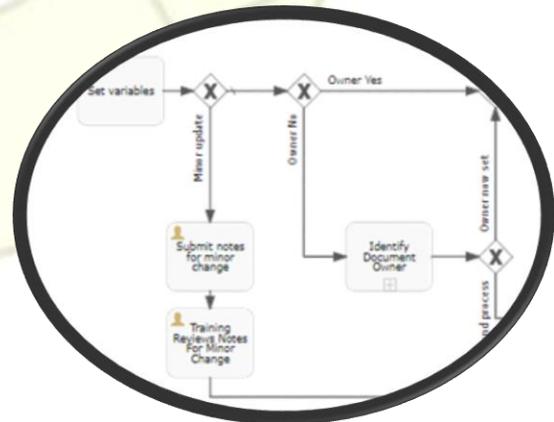


By building ClearNotice on the **Alfresco Digital Business Platform** which includes content, process workflows and document retention, ClearNotice provides the following benefits to your organization:

### Create & Edit

As SOP documents are created and stored within the **Alfresco Content Services (ACS)** repository, ClearNotice kicks off a workflow with Alfresco Process Services to notify the parties involved. The workflow is triggered by starting the process and providing key information such as:

- Is it a new or existing piece of content?
- Is the initiator the owner?
- What is the reason for the change?



### Project Member Distribution

ClearNotice can either send a task to all members of a department or to specific roles within a department. The flexibility is yours. Keep everyone informed even if a change does not directly affect them. This keeps communication lines open. To ensure important documents are reviewed either by departments or specific people, the system can require confirmation that a document has been reviewed.

## Vetting

When the SOP is new, a Vetting process takes place to determine who are the appropriate stakeholders. Each department can identify themselves as content owners or key stakeholders. All results are tabulated and presented so a final decision can be made.

ClearNotice for SOP

Document: No preview available

Clear View Progress view.doc

Document Owner: HR

Communicate to Departments\*  
 Yes  
 No

Select Departments to Communicate to  
Department: Type to search departments...  
Search Results:  
ADD DEPARTMENT

Communication Approval by IT Development

Assignee: Kevin J Beddingfield Due: in 3 days Part of process: ClearNotice Digital Content Control - June 6th 2019

No people involved 1 group(s) involved No content items No comments No checklist SHOW DETAILS

SAVE APPROVE DECLINE

Document: No preview available

Clear View Progress view.doc

Document Owner: HR

What: sdfs

Why: sdfs

Impact: Medium

Effective Date: 09/18/2019

Document: No preview available

Test-1- ClearCadence Emergency Contact Form-1.doc

Display Dept Owner Reviews

Department	Add to Stakeholders	Agree Document Owner	Notes(if any)
Marketing	Yes	Yes	
Training	No	Yes	
Compliance	Yes	Yes	

SAVE COMPLETE

## Collaboration

Departments can provide feedback to the documents being reviewed. All of their responses and questions are tracked within the ClearNotice system.

## Approval

The Approval process is a collaboration among the owners, stakeholders and key departments. Each person associated with the process reviews the updates to the content, asks any necessary questions for clarifications, makes comments, and ultimately Approves or Rejects the updates. The collaboration continues until either all stakeholders approve the updates or the process is terminated by the initiator.

## Publish

Once the document has been reviewed and confirmed by the necessary parties, it is published out to ACS as a part of the project package. All documents within the project folder will be given a file plan via Alfresco Governance Services to be retained for a configurable amount of time.

## Communication

Once the content is approved, a communication message is crafted via a separate approval process to establish a formal awareness of the updated or new content and to set the Publish and Go Live dates.

## The Benefits of ClearNotice

- Notification setup, assignment, and **single point for all information** relating to the SOP content all in one custom workflow application
- Tracking of regulation lifecycle within the company providing **full accountability**
- Customizable to **fit your business needs**
- Built on a BPMS platform that can be used to **resolve other business challenges**
- ROI on initial costs can be obtained by comparing to just ClearNotice benefits or based on other solutions handled by BPMS.



## Highlights

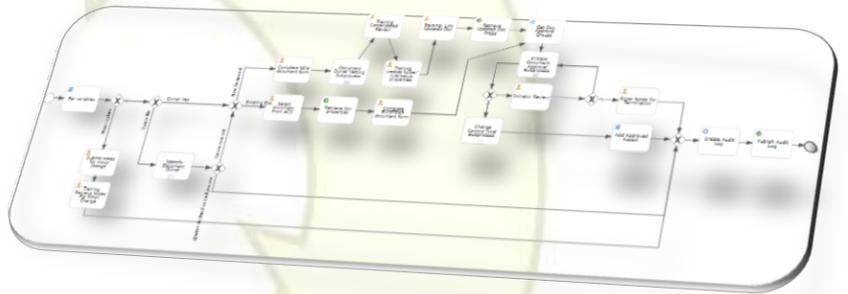
- Customized workflow rules – your business rules automated
- User roles and groups – make sure the right work is seen by the right people
- Customized forms with populated with your business data
- Workflow auditing – from knowing each step a work item went through to how much time it took at each step

## Benefits

- Automated timers to ensure timely follow up on business critical work items
- Work-step automation for commonly used tasks
- Coordination of BPMS development between business and IT.
- General and specialized searches including Full Text
- Support for desktops, web, and mobile user interfaces
- Out of the box integration to third party applications like SQL, Oracle, SAP, Exchange, and more

## We Know BPM

ClearCadence can provide BPM assistance from learning, defining, developing, and maintaining your Business Process Management Strategy and provide expert-level skills from analysis to implementation. Our services allow you to have the right path for success in executing your BPM strategy at the department and/or enterprise level. Our expertise in the BPM field is provided by certified professions with real-world, practical experience.



## Proven Delivery Methodology

The ClearCadence Delivery Methodology is a complete and adaptable approach to rapidly deploying your Business Process Improvement initiatives. Developed and continuously enhanced by the industry experts of the ClearCadence Professional Services team, the best practice delivery methodologies help you increase speed to value and establish a solid foundation for on-going process and system improvements by fully leveraging the depth of capabilities and flexibility offered in BPM software solutions.

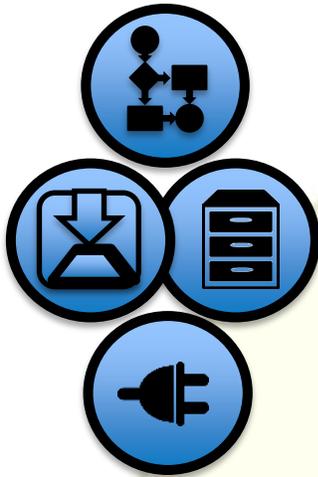
With a strong customer focus and emphasis on collaboration, the ClearCadence Delivery Methodology helps ensure your implementation is easily understood and embraced.

Throughout the entire engagement, you maintain full project visibility and participation, allowing checkpoints and milestones to be easily tracked and measured by everyone involved. The ClearCadence approach to implementation enables the transfer of knowledge and skills to your team, and helps you achieve a rapid and successful solution roll-out that delivers immediate results.

## Why ClearCadence?

ClearCadence provides consulting and delivery of solutions that specialize in automating and improving manual processes, digitizing your key assets, and integrating with mission critical systems.

Our key areas of focus:



**Automate** – Data capture and end-to-end business process workflows;

**Digitize** – Paper, electronic documents, source feeds, and data from back-end applications become content managed under an enterprise system;

**Integrate** – Provide seamless connections to mission critical systems such as ERP, CRM, and Procure-to-Pay solutions.

ClearCadence has the experience and resources necessary for successful planning, architecture, design, development, customization, project management, technical support and education to help you get the most out of your BPMS investment. We offer the right combination of the industry's top people and solutions to help you meet your business objectives. ClearCadence Professional Services deliver:

- ✓ **Expert consultants who understand BPM, integration, and business process challenges in your industry**
- ✓ **Trainers experienced in knowledge transfer**
- ✓ **Superior customer service for immediate response and results with 100% client satisfaction**



ClearCadence is committed to your success and to building a long-lasting relationship that helps you realize a strong return from your investment – both now and into the future. Let our Professional Services team help you take full advantage of BPM disciplines and technology by analyzing your business and system processes, identifying issues, and transforming them into efficient solutions.