Operations & Admin Cheat Sheet

Create meeting agendas, document processes, draft SOWs, and follow up on invoices.

Prompting Tips for Operations & Admin

- Document processes while they are fresh, not months later.
- Keep SOW language formal but clear enough for non-technical stakeholders.
- For invoice follow-ups, calibrate tone based on relationship history and number of reminders sent.

Create a Meeting Agenda

Set up a structured meeting agenda that keeps conversations focused and productive.

PROMPT

You are a meeting facilitator creating a structured, focused agenda for a business.

Meeting details:
- Purpose: [what this meeting is about]
- Attendees: [who is attending]
- Duration: [how long]
- Date/time: [when]
- Location/platform: [where]

Topics to cover:
1. [Topic 1]
2. [Topic 2]
3. [Topic 3]

First, estimate time allocations based on topic complexity and meeting duration. Then create an agenda that:
1. Has a clear objective at the top
2. Allocates time to each topic
3. Identifies who leads each discussion
4. Includes space for action items
5. Ends with a next steps section

Format it cleanly so I can paste it into a calendar invite or email.

If some meeting details are missing, create the best agenda possible and note where specifics should be filled in.

Document a Business Process

Turn the process in your head into clear, step-by-step documentation anyone can follow.

PROMPT

You are a business operations consultant who helps small teams turn informal processes into clear documentation.

Process name: [e.g., Client Onboarding Procedure]
Purpose: [what this process achieves]
Who does it: [role or person]
How often: [frequency]
Current steps (rough): [describe what happens, even informally]

Please create a process document with:
1. **Process Name and Purpose** (1-2 sentences)
2. **When to Use** (trigger conditions)
3. **Prerequisites** (what is needed before starting)
4. **Step-by-Step Instructions** (numbered, clear, actionable)
5. **Common Mistakes to Avoid** (2-3 pitfalls)
6. **Expected Outcome** (what "done" looks like)

Write it so someone new to the business could follow it without additional guidance.

If the current steps are informal or incomplete, build the best process document possible and flag steps that may need the owner to verify or expand.

Draft a Statement of Work

Put together a professional SOW from your project details to formalize scope and deliverables.

PROMPT

You are a contracts specialist drafting a Statement of Work for a business.

Project details:
- Project name: [project name]
- Client: [client name]
- Start date: [date]
- End date: [date]
- Scope: [what is included]
- Out of scope: [what is excluded]
- Deliverables: [list of deliverables]
- Milestones: [key dates]
- Payment terms: [payment structure]
- Assumptions: [key assumptions]

First, review the details for completeness. Then draft a professional SOW with these sections:
1. Project Overview
2. Scope of Work
3. Deliverables and Milestones
4. Timeline
5. Roles and Responsibilities
6. Payment Terms
7. Assumptions and Exclusions
8. Change Management Process
9. Acceptance Criteria

Use clear, formal language appropriate for a binding project document.

If any project details are not provided, include the section with [INSERT: description] markers so the document structure is complete.

Write an Invoice Follow-Up

Send a respectful, clear reminder about an overdue invoice while keeping the relationship strong.

PROMPT

You are a business communications professional helping a business owner follow up on an overdue payment with the right balance of firmness and warmth.

Details:
- Client name: [client name]
- Invoice number: [invoice number]
- Amount: [amount]
- Original due date: [date]
- Days overdue: [number of days]
- Previous follow-ups: [how many reminders sent so far]
- Relationship: [brief context on the client relationship]

First, consider the relationship context and number of prior follow-ups to calibrate the tone (first reminder should be gentler, subsequent ones firmer). Then write an email that:
1. Is professional and courteous (not aggressive)
2. Clearly states the invoice details and amount
3. Acknowledges that oversights happen
4. Asks for a specific payment date
5. Offers to discuss if there is an issue

Tone: firm but respectful. Under 150 words.

If the relationship context or follow-up history is not provided, write a professional first-reminder email and note where adjustments would be needed for repeat follow-ups.

Prepare Compliance Documentation

Organize procurement compliance evidence and regulatory documentation for a bid or audit.

PROMPT

You are a compliance specialist helping a business prepare documentation for a procurement requirement or audit.

Context:
- What is this for: [e.g., RFP compliance section, certification renewal, client vendor qualification]
- Requirements to address: [list specific compliance requirements]
- Available documentation: [list what you already have]
- Gaps or concerns: [anything you know is missing or uncertain]

First, review the requirements against available documentation to identify what is complete, what needs updating, and what is missing. Then provide:
1. **Compliance Checklist**: Each requirement mapped to available evidence (Met / Partially Met / Gap)
2. **Gap Analysis**: What is missing and what steps are needed to address each gap
3. **Document Organization Guide**: How to structure and label the compliance package
4. **Timeline Estimate**: Realistic estimate for resolving gaps
5. **Cover Narrative**: A brief compliance summary statement suitable for the submission

If the requirements or available documentation are not fully listed, provide the checklist structure and note where the business owner needs to fill in specifics.

Draft a Partnership Agreement Outline

Structure a teaming arrangement or joint venture agreement with another business.

PROMPT

You are a business development advisor helping a company structure a partnership or teaming arrangement.

Partnership details:
- Your company: [your company name]
- Partner company: [partner company name]
- Purpose of partnership: [why you are partnering]
- Your role: [your responsibilities]
- Partner role: [their responsibilities]
- Revenue/cost split: [proposed split]
- Duration: [how long the arrangement lasts]
- Key concerns: [e.g., intellectual property, liability allocation, decision-making authority]

First, consider the power dynamics, risk allocation, and long-term implications of this arrangement. Then draft an outline covering:
1. **Partnership Overview**: Purpose, parties, and scope
2. **Roles and Responsibilities**: Clear division of work
3. **Financial Terms**: Revenue sharing, cost allocation, invoicing
4. **Decision-Making**: How decisions are made, dispute resolution
5. **Intellectual Property**: Who owns what
6. **Liability and Insurance**: Risk allocation
7. **Term and Termination**: Duration, exit conditions
8. **Confidentiality**: Information sharing boundaries

Note: This outline is a starting point for discussion with a lawyer, not a legal document.

If partnership details are incomplete, provide the outline structure with [INSERT: description] markers for missing specifics.