Imagico

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Imagico

Operations Manual

October 2026

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Introduction: Imagico

This sample document is called a **ShipShape Manual.** It consolidates employee information and makes it accessible to company staff.

NOT A WEBSITE, although it works like one. This document is a PDF file created with standard word processor software (in this case, Mac Pages).

Imagico is an imaginary company.

Optimized for iPads and other tablets (because so many businesses offer tablets for use by their staff). It is designed for fingertip navigation, **no mouse required**.

It also works suitably in mobile and desktop browsers. (And it works great in PDF readers, like Adobe Acrobat and Mac Preview.)

Easy and economical

- No special software (use Microsoft Word, Mac Pages, Google Docs).
- Easy to create.
- Easy to edit.
- Easy to expand.
- No subscription fees. (Host it in a password-protected folder at your existing website host; I can help you.)

Services I offer

I can help your company:

- **Create** — Establish your company's first **ShipShape Manual**.
- **Train** — Teach you and your staff how to implement and expand it.
- **Coach** — Once your staff understands the elegance of managing operations with a collection of organized small documents, use this methodology in other ways.

Let's build one for your business: Contact Me. Also…

Find more helpful information about creating a document like this here.

—Greg Kagay

Company

Introduction

News

Events

Awards

Introduction

The Company section of the ShipShape Manual houses facts about your operations, and news relating to it.

Here, you might find details that are also appropriate for your company website. But, if your company does not have a website, or if it is too difficult to update often, this Manual offers a great method for delivering such information to your employees.

Also, linking from here to information on your website is simple. And doing so avoids re-inventing the wheel. Just add the definitive content to your site and link to it from the appropriate section in this document.

As for News and Events, while some of this information may be on your website, other such content may be meant only for an internal audience. A Manual like this functions brilliantly as an internal bulletin board. You will see some examples of this sort of content below.

News

- Jane Smith Named Senior Editor of Company Operating Manual
- Jackson Manufacturing Co. Hires Imagico to Provide Full-Service Facilities Support
- Imagico Launches Innovative Operations Manual
- Collaboration of FauxCo and Imagico Well Received by Market

Jane Smith Named Senior Editor of Imagico Operating Manual

July 12

Imagico is pleased to announce the promotion of Jane Smith to the position of Senior Editor of our company Operations Manual. She will work with department managers to maintain and enhance this popular communications portal. At a luncheon announcing her promotion, Ms. Smith said: “I look forward to working with all of our capable managers. And I want all employees to know they may submit suggestions any time. The Operating Manual is for all us.”

Events

Collaboration Day

June 25: All employees are invited to participate in our quarterly "All-Hands Continuous Improvement" event. Bring your ideas and your creativity. The Keynote address will be presented by noted efficiency expert Robert Deming, III. Small workshops and breakout groups will develop new ideas for improving Imagico. 10am - 2pm. Lunch served.

Parking Lot Pop-Up

July 3: Invite your friends to participate in this popular seasonal event. Over 14 vendors featured. For more information, see the online flyer.

Demo Convention

August 1: Level II sales personnel are invited to participate in our Demo Day Convention on the first Sunday in August.

- earn **time and a half** pay
- great networking opportunity (the leads come to you)
- all team members that have completed the level II training program are eligible

Awards

- Imagico Wins Gold Medal in Fine Companies Magazine Survey
- Silver Medal for Three Imagico Products at West Coast Concours International
- Sales Trainer John Smith Named to City-Wide Influential People List
- Imagico to Sponsor State Fair Youth Craft Camp

Sales Trainer John Smith Named to City-Wide Influential People List

June 15

For the third year running our Senior Sales Instructor, John Smith, has been named to the *Times Digest* "Important City People" list of influential citizens in our community. Please join us in congratulating John for this recognition. Read more at the *Times Digest* website.

Operations

Introduction

Wi-Fi Passwords

Opening Checklist

Closing Checklist

Dishwasher Maintenance

Introduction

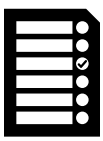
The **Operations** section features information employees need to do their jobs, as well as details to keep your company running well. Two primary tools found here are **Checklists** and **Instructions**. This section is also appropriate for hosting information about your facilities in general, such as your public Wi-Fi password.

Checklists

Checklists are invaluable aids for managing your **staff** *and* your **operations**.

In the case of staff, checklists ensure employees pursue their jobs (and complete their tasks) comprehensively. You will see simplified examples below.

As for operations, when was the last time you dusted those sales area ceiling fans, replaced the warehouse HVAC filters, or cleaned the expired foods out of the pantry in the break room? Put items like this on a seasonal checklist so you and your team will not overlook such infrequent but important tasks.



Instructions

Instructions are often critical for successfully completing complicated or infrequent chores. For example, cleaning the filter on the dishwasher may not be something that needs to be done often. But, it may be complicated enough that few employees remember how to do it. When that red warning light comes on, a well written "step-list" could make anyone on your staff a de-facto specialist who can keep your system working.

Wi-Fi Passwords

Public Network (for customer use)

Network Name: **Imagico-Public-Net**

Password: **gourmethamburgers**

Private Network (for employee use only)

Network Name: **Imagico-Private-Net**

Password: Password available to administrative employees only.

Opening Checklist

[ ] Switch Widget Machine from Standby to Operate

[ ] Clean Display Glass with Glass Cleaner

[ ] Unlock Cash Drawer

[ ] Turn On Store Music on Sales Counter Tablet

[ ] Set Deal of the Day Signs on Front Sidewalk

[ ] Switch Neon Sign from Closed to Open

Closing Checklist

[ ] Sweep Area Behind Cash Register

[ ] Turn Off Store Music on Sales Counter Tablet

[ ] Set Cash Deposit in Safe

[ ] Close And Lock Safe Door

[ ] Empty Trash Cans And Replace Liners

[ ] Bring in Deal of the Day Signs from Front Sidewalk

[ ] Switch Neon Sign from Open to Closed

Dishwasher Maintenance

If you see a red warning light on the dishwasher in the break room, it is very important to quickly clean the main filter right away. If not, the room may flood (again). The procedure is simple.

1. Unplug the machine (inside cabinet on right side).
2. Remove the lower dish rack (set on stainless steel countertop)
3. Pull red tab labelled “Pull Here” to remove beauty valence panel.
4. Set panel on stainless steel countertop.
5. Unscrew (counter-clockwise) filter housing.
6. Remove filter and wash it* in the mop sink. (Not in the hand-washing sink!)
7. Replace the filter in the housing.
8. Screw filter housing (clockwise) back into place.
9. Replace beauty valence panel (make sure it is right-side-up; you will hear a click).
10. Replace bottom dish rack.
11. Plug cord back into receptacle.

*If the filter has cracked, contact facilities@imagico for a replacement.

Selling

Introduction

Customer Care

PointsWallet

Introduction

The **Selling** section features information to inform your staff about serving customers.

It is the perfect place to feature lists of talking points about your company's products and services. Such lists can help employees do their jobs more effectively.

Some topics missing from this example document are **Products** and **Services** themselves. If that sort of information is not on your company's website, this section would be a prime location in which to host things like price lists, as well as links to things like independent product reviews, manufacturers' websites, etc.

This section is also a good location for links to educational resources, such as videos instructing employees how to get the most out of your customer relations management software, payment systems, or point of sale applications.

Links describing industry certifications and other educational resources are another good examples of Selling section content.

Finally, do you know any good books or websites your employees should read or reference? Link to them here.

Customer Care

Arriving Customers

- Always be welcoming, engaged and energetic.
- Ask customers if they have specific questions.
- Escort customers to the department of their choice.
- Introduce customers to sales associates and mention a first name: “This is Tony, he knows a *lot* about the products you are interested in.”

Departing Customers

- Thank all customers for visiting.
- Offer customers a copy of our monthly *CompanyTimes* newsletter.
- Inform customers of our regular **Saturday Expo Days**, where they may test-drive our products.

PointsWallet

Our Loyalty Program

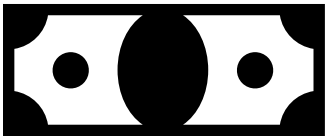
PointsWallet is Imagico's customer loyalty program. We designed it to be easy for customers to use.

Here are a few **talking points** for informing customers about the program:

- Earn 10 WalletBucks for every $100 you spend on Widgets
- WalletBucks are added to your account automatically.
- Every month you will receive a summary email detailing what you bought and summarizing your WalletBuck balance.
- Then, when you buy more widgets, you receive a WalletBuck discount.
- WalletBucks expire after 18 months and are non-transferrable.

More Information

PointsWallet is hosted by a third-party provider; if your customers would like more information, direct them to this website: www.CustomerKeeper.com/Imagico.



Human Resources

Introduction

Employee Roster

Breaks (Lunch/Coffee)

Employee Discounts

Onboarding Checklist

Introduction

The **Human Resources** section features information specific to employees and employment.

An Employee Roster will help your employees connect with each other easily when the need arrises. (Incidentally, this is a great piece of content with which to begin building a ShipShape Manual.)

The Onboarding Checklist is a great tool for new employees. Although most employees will only make use of it for a short time, it puts all the information they need for employment into their own hands, enabling them to manage their first days on the job themselves. Such a checklist will enable them to do so with confidence that they are doing all they need to do (so you don't have to).

Other appropriate content for this section includes employment policies for such things as lunch breaks, scheduling, vacation, discounts, etc.

Employee Roster

We provide the information below for instances in which our employees need to contact other associates for work-related communications.

Respect your colleagues; if you don't know someone well, use these numbers for *bona fide* work inquiries only.

Also, if you are not well acquainted with someone, be sure to identify yourself as an associate when calling or sending texts and indicate your name and department.

Associate	Department	Contact
Chuck Ambrose	Sales	629 367-2402
LeRoy Castleman	Warehouse	607 8218-906
Mary Deándre	Sales	334 766-3281
Tammy Bunsom	Repairs	308 873-9080
Victor Fulsom	Facilities	515 671-1915
Xavier Emerson	Administration	417 615-7482
Etc…	Etc…	Etc…

Breaks (Lunch/Coffee)

- Lunch Breaks
  - Saturdays - 30 minutes
  - Other Days - 45 minutes
- Coffee Breaks
  - One 15-Minute Break for Every Four Hours Worked

Notes

- Consume snacks and drinks in the break room only.
- Eating and drinking is not allowed in sales areas.
- Employees may make use of the microwave oven and the electric kettle in the break room for heating dishes.
- Please keep the break room door closed during meals to mitigate aromas migrating to the sales areas.

Employee Discounts

Note: All discounted transactions must be entered into the Triangle payments system using the employee customer account ID.

Discounts

- **Employee Discount**: 25% off all goods and services. No discount on sale items.
- **Friends and Family**: 10% off all goods, no discount on services. Who qualifies? Ask your manager.

Onboarding Checklist

Welcome to the Imagico family. This checklist is here to help new employees take care of all the necessary details for employment. Let's get these few formalities out of the way so you may begin training and start working. Just follow this checklist to become an active Imagico team member:

Apps to Download

- Scheduling App
- Payroll App
- Bookmark this Document in Your Browser

Documents to Complete & Submit

- W-4 Form
- Emergency Contact Form
- Confidentiality Awareness Form
- Business Card Request Form
- Email the Following PDF Documents to hr@imagico.com
  - Copy of State Widget Handling Certificate
  - Copy of Driver's License
  - Copy of Social Security card

Training Videos to Study

- "Triangle" Payments System Video Training Package
- CRM Video Instruction Program

Suggestions

Introduction

The **Suggestions** section may be short but it is very important.

Your employees are on the front lines of your operations; shouldn't you be listening to them?

After all, two-way communication is the lifeblood of continuous company improvement.

Adding a Suggestions section like the one below (and encouraging your employees to make use of it) will not only solve many problems in your operations but, likely, also illuminate new business opportunities.

Strongly consider publicly acknowledging helpful suggestions and presenting rewards. Recognition could be as simple as a mention at a weekly meeting, or a write-up in the News section of your company's ShipShape Manual. Examples of rewards include gift cards, free company merchandise, etc.

Submit Suggestions

We recognize proactive employees and reward their good ideas! Please let us know how we might improve our operations (or this document).

- Send us your suggestions.
- Also (relating to this document), report typos, broken links, misinformation, or out-of-date information.
- Send an email describing your suggestions and feedback to admin@imagico.com

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Submit Suggestions

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