VIP TRAINING · DAY 3 · DO MORE

Build Your SOPs With AI

Record it once. Train anyone. Turn the tasks in your head into step-by-step guides and videos your team can follow without you.

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START HERE

The Stuff in Your Head Is Your Biggest Bottleneck

If a task only lives in your head, only you can do it. A good SOP turns "ask Sean" into "check the guide."

Most photographers never write SOPs because writing them takes forever. With AI, you don't write them. You record yourself doing the task and talking through it, and Claude turns the recording into a clear, step-by-step training guide. Your team gets two things: **a guide to follow** and **a video to watch**.

What Every SOP Includes

SECTION	WHAT IT COVERS
Video link	The unlisted recording, right at the top
Overview	Purpose, who does it, when, how long it takes and what "done" looks like
Tools & logins	Every app, account and file they'll need before they start
Numbered steps	One action per step, with a screenshot at each key step
Your standards	The rules that make it *your* work: settings, sizes, wording, quality bar
Common mistakes	What usually goes wrong, and how to avoid it
Final checklist	A quick check before anything is marked done

SKILLS + SOPS

Remember the formula from today: **the skill does the thinking, the SOP shows the steps.** A Claude skill writes the blog post. The SOP shows your VA how to run the skill, check the result and publish it. Step 08 shows you how to turn an SOP into a skill.

How the prompts work

Create a Claude Project called **SOP Builder** and run every prompt in this guide inside it. Anything in **[brackets]** is where you fill in your own details. Every prompt tells Claude to use only what's in your recording. Keep that line in, so your SOPs match how you really work.

HOW TO USE THIS GUIDE

Your Step-by-Step Roadmap

Your first SOP takes about an hour from start to finish. After that, most take 30 minutes of your time, and most of that is doing the task you were going to do anyway.

STEP	WHAT YOU'LL DO	TOOL
01	**Pick your first SOP**	Claude · Priority Prompt
02	**Plan the recording** so nothing gets missed	Claude · Recording Plan Prompt
03	**Record it** while you do the real task	Loom, Zoom, QuickTime or similar
04	**Get the transcript and screenshots**	Your recorder + screenshot tool
05	**Build the SOP**	Claude · SOP Prompt
06	**Review it and test it** with your team	You + your VA · Update Prompt
07	**Publish it** with the video, in one library	YouTube (unlisted) + Claude Project
08	**Level up:** turn the SOP into a skill	Claude · Skill Prompt

What You'll Need

- [ ] Claude, with a Project called **SOP Builder**
- [ ] A screen recorder that records your voice, like Loom, Zoom, QuickTime (Mac) or any tool you already use
- [ ] A YouTube account for unlisted videos, or anywhere your team can watch a video
- [ ] One real task to do while you record

SEE A FINISHED EXAMPLE

The **Blog Post SOP Demo** in your VIP downloads shows exactly what this process creates, from one recording of writing and posting a blog post.

STEP 01

Pick Your First SOP

Start with a task you do often, the same way every time, that someone else could do with the right instructions.

Six SOPs Every Senior Photographer Should Have

SOP	WHAT IT COVERS
Video Editing	Reels and highlight videos: your style, music, pacing and export settings
Gallery Culling & Delivery	How you cull, what makes the cut and how galleries are delivered
Lab Ordering & Quality Check	Submitting orders, color checks, packaging and delivery
Inquiry & Booking Follow-Up	Response times, templates, follow-up schedule and CRM updates
Social Media Scheduling	What gets posted, where, when and how it's captioned
Client Onboarding	Contracts, prep portal links, reminders and session-day prep

Not sure where to start? Let Claude rank your tasks by the time you'd get back.

PRIORITY PROMPT

Help me decide which SOPs to create first for my senior portrait business.

Here are the tasks I do each week, with roughly how long each takes and how often:
[task – time – how often, one per line]

My team: **[e.g., one part-time VA, 10 hours a week]**

Rank these by how much time I'd get back if someone else did them. Flag anything that needs my eye or my judgment and shouldn't be handed off yet. Then recommend my first three SOPs, and tell me which one to record this week.

STEP 02 · 5 MINUTES

Plan the Recording

You don't need a script. A quick outline makes sure you say the things that usually stay in your head.

RECORDING PLAN PROMPT

I'm about to record my screen while I **[task, e.g., cull and deliver a senior gallery]**, so my VA can learn it.

Give me a short recording checklist:

- The steps I should show, in order
- The decisions and standards I should explain out loud (why I do it this way, what "good" looks like)
- Settings, files or logins I should show on screen
- Common mistakes I should warn about
- Anything private I should hide before I start

Keep it to one page. I'll glance at it while I record.

Recording Tips

Do the real task

Record while you actually do it, with a real session. Fake examples leave out the details that matter.

Say the why

"I always pick the one where her eyes are open and her chin is down" is the gold. Your reasons become your standards.

One task per video

Keep each recording focused, ideally 5 to 20 minutes. Break big processes into parts.

Protect privacy

Close your email, hide client contact info and turn off notifications before you hit record.

STEPS 03 & 04

Record It, Then Grab the Transcript and Screenshots

The transcript gives Claude your words. The screenshots give it what you see.

1

Record your screen and your voice

Use the recorder you already have. Loom, Zoom and QuickTime (Mac) all work. On a Mac, `Shift + Cmd + 5` also opens a screen recorder. Make sure your microphone is on.

2

Download the transcript

Many recorders create a transcript automatically. Look for **Transcript** or **Captions** and download or copy it as text. A caption file with timestamps works too. Claude ignores the timestamps.

3

Take screenshots of the key steps

Capture settings screens, menus and the finished result. On a Mac, use `Shift + Cmd + 4`. On Windows, use `Win + Shift + S`. You can also pause the video and screenshot it.

4

Name the screenshots in order

Name them **step-01**, **step-02** and so on, so Claude can put each one at the right step.

5

Blur anything private

Client names, emails, phone numbers and passwords stay out of your SOPs, even internal ones.

NO TRANSCRIPT?

If your recorder doesn't make one, upload the video to YouTube as unlisted (you'll do this in Step 07 anyway). YouTube usually creates automatic captions within a few hours, and you can copy the transcript from the video page. Or simply talk through the steps again into any voice-to-text app.

STEP 05

Build the SOP

This is the prompt that does the heavy lifting. It works for any task.

In your SOP Builder Project, start a new chat. Attach your transcript and screenshots, and paste the prompt below.

SOP PROMPT

I've attached a transcript of a screen recording where I **[task]**, plus screenshots named in step order.

Turn this into a clear SOP for my **[VA / assistant / associate]** titled "**[How to ...]**":

- A spot at the top for my video link: **[YouTube link]**
- Purpose, who does it, when, how long it should take and what "done" looks like
- Tools, logins and files needed before starting
- Numbered steps, one action per step, with each screenshot placed at the right step
- My standards and the reasons behind them, pulled from what I said
- Common mistakes and how to avoid them
- A final checklist before it's marked done

Write it for someone who has never done this task. Remove filler words. Use only what's in the transcript and screenshots. If a step is unclear or missing, list your questions for me before you guess.

When it's ready, create a PDF I can download and share, in my brand: **[fonts, colors]**.

ANSWER THE QUESTIONS

Claude will often come back with a few questions about steps you skipped or explained quickly. Those questions are gold. They're the exact places your VA would have gotten stuck.

STEP 06

Review It and Test It

An SOP isn't done until someone else can follow it without asking you.

Your Review Checklist

- [ ] Every step matches how you really do it
- [ ] Settings, sizes and numbers are exact, not approximate
- [ ] Screenshots are at the right steps, with private info blurred
- [ ] Your standards are clear enough that two people would get the same result
- [ ] A new person would know when the task is done

The Test Run

1. ### Hand it off

   Have your VA do the task using only the SOP and the video.

2. ### Collect every question

   Ask them to write down every question, guess or place they got stuck, instead of messaging you.

3. ### Update the SOP

   Paste their notes into the prompt below. Every question they asked becomes an answer in the guide.

UPDATE PROMPT

Here's my SOP: **[attach or paste]**

My VA followed it and had these questions and problems:
[paste their notes]

Here's how I'd answer each one: **[your answers]**

Update the SOP so the next person won't have these questions. Keep everything else the same. Add a line at the bottom: "Updated **[date]**: **[what changed]**." Then create a new PDF.

STEP 07

Publish It With the Video

A guide to follow and a video to watch, both in one place your team knows to look.

1

Upload the video as unlisted

On YouTube, set visibility to **Unlisted**. Only people with the link can watch it. Add the link to the top of your SOP.

2

Keep one SOP library

Pick one home for every SOP: a shared Google Drive folder, a Notion page or a Dropbox folder. Name files the same way every time, like **SOP – Gallery Delivery – v1**.

3

Add it to your team's Claude Project

Add each SOP to the files of the Project your VA uses. Now your VA can ask Claude a question and get an answer straight from your SOPs.

PROJECT INSTRUCTIONS · TEAM HELP DESK

You're the help desk for my team at **[Studio Name]**. The files in this Project are my SOPs.

When someone asks how to do a task:

- Answer using only my SOPs, and name the SOP and step you're using
- Give the steps in order, and include my standards
- If the answer isn't in my SOPs, say so, and tell them to ask **[me / name]**. Never guess.
- If a question comes up that an SOP should answer, suggest adding it to that SOP

KEEP THEM CURRENT

Every 90 days, skim your SOPs. When a tool or process changes, run the Update Prompt with what changed and swap in the new PDF. An outdated SOP is worse than none.

STEP 08 · LEVEL UP

Turn an SOP Into a Skill

Some steps in your SOP are thinking work: writing, choosing, formatting. A Claude skill can do those steps for your team, exactly your way.

Stays in the SOP

Logging in, uploading, clicking publish, checking the lab order, anything done in another app.

Becomes a skill

Writing the blog post, drafting captions, writing client emails, building a timeline, anything Claude can create.

SOP TO SKILL PROMPT

Here's my SOP: **[attach]**

Find the steps that are writing, decision-making or formatting work that Claude could do, like **[e.g., writing the post, SEO title and meta description]**.

Create a Claude skill for those steps:

- A clear name and a description of when to use it
- The steps, in order, with my standards from the SOP
- What to ask for if information is missing
- An example of great output, based on the SOP

Then update the SOP so that step says: "Run the **[skill name]** skill, then review the result using this checklist."

Save the skill in Claude and share it with your team. Now the SOP shows the steps, and the skill does the thinking, so your team gets your results every time.

YOUR CHECKLIST

Your First SOP This Week

One SOP a week for six weeks, and the tasks that keep you stuck are off your plate.

Prepare

- [ ] Create your SOP Builder Project
- [ ] Run the Priority Prompt
- [ ] Pick this week's SOP
- [ ] Run the Recording Plan Prompt

Capture

- [ ] Record the real task, out loud
- [ ] Download the transcript
- [ ] Take and name the screenshots
- [ ] Blur anything private

Build

- [ ] Run the SOP Prompt
- [ ] Answer Claude's questions
- [ ] Review it with the checklist
- [ ] Upload the video as unlisted

Hand Off

- [ ] Have your VA do a test run
- [ ] Update it with their questions
- [ ] Add it to your SOP library and Project
- [ ] Mark the thinking steps for a skill

START SMALL

Your first SOP won't be perfect, and it doesn't need to be. The test run shows you what's missing. Every SOP you finish is one more task that no longer needs you.