

# Centralizing Standard Operating Procedures in a Large Online Education Division



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## Abstract

The growth of online education is complex and multidimensional involving areas such as design and development, media, program operations, and data management. Online education divisions are multifaceted, and vital to the business operations of a university. The focus of the online education division in this case study, operating at a private, R1 university in Northeast America, was to streamline, centralize, and standardize the operational processes (or SOPs) within the department. What started as the expectation of a few SOPs grew into the documentation and standardization of more than sixty processes that had never been formally documented. The study findings highlighted the cross-functional dependencies, gaps in process ownership, and lack of operational knowledge in the division. The focus of this article is to provide distance education administrators the tools and resources to enhance their operational framework with SOPs.

*Keywords:* education administration, online learning operations, standard operating procedures, cross-functional collaboration, best practices, lessons learned, facilitated workflow, process improvement

In distance education, administrative functions require coordination across many units that have their own functions. According to Barrett and Poole (2009), the growth and expansion of these online education functions bring in increased complexity and specialization which require greater coordination. Additionally, each area can increasingly have siloed processes and workflows across the separate functions. In the absence of a documented process and workflows, there is a risk of the processes evolving on their own which often leads to ambiguity in ownership, lack of efficiency, and waste across the functions. Standard Operating Procedures (SOPs) are an excellent way of establishing clarity, consistency, and accountability. This study analyzes how one of the larger divisions of online education at a private, R1 university started an initiative to centralize SOPs to foster operational transparency and cross-function alignment. What started as a single, innocuous administrative task to work on several SOPs transitioned to a significant organizational endeavor that created over sixty distinct SOPs within the division.

The operation has helped to better understand the complexity of online learning ecosystems, the degree to which undocumented work can spread, and the ways to improve business functions and team culture through SOPs. Other institutions can use the knowledge from this study to improve the administrative processes to deliver online learning at scale.

## **Literature Review**

With the growth of online education comes complex processes that must be completed by cross-functional teams within the higher education ecosystem. Barrett and Poole (2009) posit that with the increase in instructional technology capabilities and online learning programs; there came further role specialization and potentially isolated functions within these online education departments (p. 45). Sekli and De La Vega (2021) further this notion by considering how the fourth industrial revolution, which revolves around technological advancement in the modern age, have reshaped the necessity for knowledge management processes (p.1). As a result, clear communication and task designation are essential to ensure smooth, efficient operations.

Vander Kuil and Smith (2022) determine that online education organizations can encounter inefficiencies and delayed work due to inconsistent and undocumented processes (p. 305). This kind of error can lead to duplication of work and miscommunication between teams, leading to further frustration. Similarly, Willett and Kirschner (2019) argue that the lack of documentation can encourage what they describe as tribal, or in more applicable terms for this field, tacit knowledge. This knowledge is the expertise and process understanding that resides within individuals rather than being transparently documented (p. 748). The absence of such documentation increases the risk that critical operational knowledge will exit an organization alongside departing staff, further compounding inefficiencies.

There is also a need for process ownership and clear task delegation. Betts and Heaston (2014) argue that these clear roles are essential for cross-functional educational teams, similar to the team in our case, in order to complete the necessary operational tasks efficiently and with accuracy. Additionally, Van Wart et al. (2020) posit that standardized processes enhance reliability and accountability, particularly in digital workplaces that operate across several units (p. 310). Lastly, Errida and Lotfi (2021) found that others in this space have found success when leadership of the initiative provides clear communication, allows for a gradual rollout to limit burden on participants, and empowers those involved to create processes for the organization. This finding was applied in our case, as the initial scope was expanded along with timeline being increased to allow for participants to contribute without feeling too much burden on their workload.

### **Institutional and Organizational Context**

The online education division of this case study supports fully online academic programs at a large private research university located in the northeastern United States. The division has close to sixty primarily remote staff, which are organized in specialized units such as Instructional Design, Digital Media Production, B2B Partnership Support, Program Management, Advising, Course Management, and Data and Analytics. These units work collaboratively to design, develop, and deliver over 115 courses across 10 online graduate programs, with learners varying from traditional online graduate students to corporate learners who are engaged with a program as a requirement of their job.

These teams have shared goals to increase access to learning while hitting enrollment milestones. As a result, there are cross-functional collaborations that require joint decision-making and task completion, and many of these decisions can be considered high-stakes in terms that they impact a learner's experience. Within such a workflow, the chances for miscommunication or incorrect completion of tasks is rather high, yet the division did not have a central repository of documented processes, such as a shared SharePoint or Google drive folder that was easily accessible for all team members to access. As a result, division team members often had limited knowledge of how other units did their work, and in some cases, were unaware when efforts for the same task were being duplicated.

As the division expanded its courses and the overall portfolio of online programs, the lack of cohesive understanding of processes began to impact efficiency in all units. Projects would stagnate, at times, due to unclear ownership, inconsistent understanding of timelines, or various assumptions by different teams. Leadership understood that to assist both internal coordination and institutional advancement, a more systematic approach to process documentation was needed. This approach seemed like an obvious strategy to correct these efficiency issues while also providing transparency across the department into the work of other units.

### **Origin of the SOP Initiative**

The SOP initiative came about as a way to make the department run more smoothly and to eliminate any gaps in efficiency. The initiative was led by division leadership in collaboration with unit managers, who delegated their staff to complete SOPs that related to their work. The goal of this workflow was to ensure representation across all functional areas. Key stakeholders included unit leads responsible for Instructional Design, Program Management, Course Management, Digital Media, B2B initiatives, and Data and Analytics, as their workflows represented the highest degree of cross-functional dependency. The main, initial goal of this initiative was to address the problem areas identified in Table 1.

### **Table 1**

#### ***SOP Problem Identification: Evolution of Internal Processes***

<b>Challenge</b>	<b>Description</b>
Limited cross-team understanding	Team members did not often have knowledge of what processes other teams were using. The gaps made it difficult to collaborate, and at times, duplicated efforts.
Unclear process ownership	Many workflows were distributed across different units and required the attention of multiple people, however there was no sole accountable owner.
Variability in execution	The process was inconsistent across stakeholders, and gaps varied based on how well it was completed.
Expansion of collaboration initiatives	As the division took on more multi-team projects, the lack of standardized SOPs created bigger coordination problems.

Initially, it was expected that there would be less than ten SOPs, believing that there were only a few high-impact workflows that needed to be centralized.

However, once the entire department found out about the new initiative, team members across all of the specialized units were quick to address additional processes that needed to be standardized based on their unclear workflows and lack of ownership on different processes. As noted in the literature review, Betts and Heaston (2014) argue that clear ownership and a system that encourages defined roles is an essential characteristic of an online program department. As a result, this initially small in scope project began to balloon, requiring significant resources for management, tracking, and follow-up.

### **The Expansion from Fewer Than Ten to Sixty SOPs**

The growth of the SOP project was beneficial to the entire unit, and the additional effort in managing the cross-functional project was worth the investment. Teams worked on processes that had never been documented as well as workflows that were documented but not widely communicated. For example, processes involving badge development and awards, course design and handoff, course revisions, survey

implementation, enrollment tracking, marketing operations, video development, and so much more, were finally documented in a central location. This expansive list reached 60+ completed SOPs in a relatively short, 5-month time frame. The large scope emphasized the intricacy of the processes that were needed to support these fully online programs. It also highlighted the sheer volume of active work that was previously invisible or had a lack of awareness across all of the units.

The expansion of this initiative led to greater transparency across the entire unit. It uncovered a more accurate operational picture of the division and created the basis for continued alignment. As noted in the literature review, Vander Kuil and Smith (2022) posit that online learning teams benefit from this type of effort as they can experience bottlenecks due to the inefficiencies that come out of an undocumented organizational process. So, while the investment in creating such a large number of SOPs was substantial, the goal is to achieve a net decrease in hours spent on inefficient work while also supporting remote staff onboarding and cross-functional collaboration.

### **Benefits and Outcomes in the Beginning**

While no quantitative data has been collected at this time, this project led to several noted qualitative benefits and outcomes that will continue to improve team operations, indicated in Table 2. It is worth noting that the decision to pursue qualitative documentation of outcomes was intentional at this stage, as the division prioritized broad participation and cultural shift over measurement details during the first cycle. Future iterations of this work may incorporate structured assessment to capture the impact more rigorously, including feedback from staff and, where applicable, learners whose experience is shaped by administrative processes.

### **Table 2**

*Benefits/Outcomes of the SOP Initiative*

<b>Benefit / Outcome</b>	<b>Description</b>
Enhanced Team Culture	The process motivated teams to form interactions, appreciate the breadth of each other's work, and recognize the interdependencies.
Improved Operational Understanding	Staff developed a clearer picture of the role and contributions of different units in the delivery of online programs which in turn eased assumptions and gaps in communication.
Improved Responsibility	Clarity in processes illuminated the accountability of each step, which in turn, diminished ambiguity surrounding task ownership and expectations.
Improved Reliability	The predictability and reliability of workflows, especially in cross-functional processes, were elevated.
Improved Documentation Culture	The project highlighted the importance of accurate and up-to-date documentation of processes as a standard organizational practice, not merely a one-off or optional task.

These improvements have started to enable more seamless collaboration and laid the foundation for continued efficiencies. As noted in the literature review, an additional benefit is the reduction of tacit knowledge, as identified by Willett and Kirschner (2019). The department over the years has experienced turnover in employment as staff left to pursue other opportunities, and this turnover has led to noted issues where once the staff member left the department, the knowledge and important workflows they owned left with them. The elimination of this siloed knowledge was one of the major goals of the SOP initiative. As programming run by the department scales, the number of staff will scale along with it, which then leads to a higher potential of staff turnover. Therefore, having documented processes and owners will allow for operations to run smoothly regardless of staff departures.

### **Implications for Distance Learning Administration**

After completing this initiative, we would like for this case to provide online learning divisions with the following insights:

- Operational tasks can be more complicated than initially anticipated. In this case, what began as a projection of fewer than ten SOPs expanded to over sixty within five months, a signal that leadership recognized early and responded to by extending timelines and broadening stakeholder participation.
- The lack of standardization in documentation leads to poor collaboration and inefficiencies. For online learning divisions specifically, this can manifest as duplicated effort, stalled projects, and onboarding challenges.
- Process ownership should be clear, otherwise, tasks can get stalled.
- Co-creating SOPs with teams enhances collaboration, ownership, and visibility.
- SOP governance is a key component for the growth of online program operations.

It is rewarding for institutions to pursue systematic SOP development if the goal is to improve the online learning operations in terms of quality, scalability, and reliability across semesters. Additionally, it is important to allocate enough time and resources to substantial involvement with this project, as it is time intensive with the initial setup and then collaborative writing that must occur in order to ensure accurate and complete documents. This process may be a change to current workflows, and as a result, may come with employee pushback or hesitancy to fully participate.

### **Change Management Considerations**

Implementing this initiative and watching it scale from a very small task to a large, cross-functional project, required change management and understanding employee viewpoints. This shift in scale results in staff being taxed further, and it was important for the leadership of this initiative to explain the reasons behind the increase in effort and remain transparent and clear in communication.

The key change management strategy used was transparency. Leadership emphasized the need for such work and the positive impact this effort would have on the larger team moving forward. Despite the initial effort in creating SOPs, it would lead to the department's long-term success if everyone bought in and contributed at their capacity. Also, the effort in co-creating SOPs with peers would serve as a team building opportunity and one where each member felt increased ownership on processes within the team. The ability to write an SOP and set the process in "stone" helped writers feel more engaged with the process.

Additionally, the rollout became more gradual as the scope increased. Leadership understood the increased effort amidst the staff's already busy schedule, so the due date for each document was pushed back to allow for the team to have time to participate.

### **Lessons Learned and Recommendations**

This initiative provided several valuable lessons that have informed our overall recommendations for other institutions, should they engage in a similar project. As noted, the original goal of this initiative was rather small, however, it quickly expanded and revealed the complexities of the department's interdependent operations. Through this realization, we learned the importance of flexibility and adaptation when working on any type of process documentation initiative.

Secondly, inclusive participation is a must as everyone's voice on the team needs to be heard throughout the project. It is important to have each department represented, as applicable. This allows for a full review of a documented process that all units can agree upon before it is final.

Third, it was determined that a clear SOP owner should be identified and tasked with any updates to the document after the initiative is complete. By identifying this role, it ensures the SOPs will remain updated should process changes occur. In connection to this lesson is the understanding that SOP development is not a singular task, and there will be iteration needed and continued review as new processes are determined.

Based on the lessons learned, we have several achievable recommendations for other institutions that may be considering a similar project. These recommendations may be found in Table 3.

**Table 3***Recommendations*

<b>Recommendation</b>	<b>Description</b>	<b>How to Implement</b>	<b>How to Measure Success</b>
Start Small, Then Scale	Initial projections may be overly optimistic, especially as the larger team is involved.	Begin with 3–5 high-impact, cross-functional processes. Use a phased rollout with checkpoints. After this is established, expand scope.	Track number of SOPs completed per phase against any initial projections.
Include Everyone	All function areas need to help determine what processes require organized documentation.	Hold stakeholder sessions by unit prior to drafting the plan. A shared intake form may be used to identify candidates.	Document representation from all units in central location,
Establish Clear Ownership	Designate process owners to maintain SOPs.	Assign an owner and backup for each SOP at time of creation. Document this ownership in a central location.	Review ownership logs quarterly; track whether SOPs are updated by established timelines.
Centralize SOPs	Store SOPs in an accessible manner to ensure ease of referencing.	Use a shared platform such as SharePoint or Google Drive, with consistent naming conventions and version control.	Monitor access analytics if available; include SOP in staff onboarding.

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Schedule SOP Reviews	Have final reviews of SOPs prior to deployment.	Set a recurring review cadence (annually or during org changes) with owners responsible for flagging updates.	Track number of SOPs updated per cycle.
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By establishing this in an SOP initiative, the team may benefit from long-run, sustained improvement.

## Conclusion

In large, complex online learning units, there is a need for common documentation of operations processes. This case demonstrated how an initially modest SOP initiative led to a much larger project which ultimately improved efficiencies, team collaboration, and operational workflows. Through creating a structured process and transparent documentation, distance learning units can maximize their efforts to scale.

While direct case studies of SOP development within online education divisions remains relatively limited, a broad body of relevant scholarship exists across organizational and knowledge management. This literature can help inform current projects in higher education. Future research should build on this cross-disciplinary foundation to better understand the lasting impacts of SOP initiatives in higher education contexts.

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