

Standard Operating Procedure

Copy this for any recurring task in your business. Fill the brackets. One SOP per process. Write every step so a capable person new to your business could follow it without asking a question.

SOP Title:	[Name of the procedure]	SOP Number:	[e.g., OPS-001]
Owner:	[Name or role responsible]	Version:	1.0
Effective Date:	[YYYY-MM-DD]	Next Review:	[YYYY-MM-DD, ~90 days out]

1. PURPOSE

One sentence: why this procedure exists and the consistent outcome it produces.

2. SCOPE

Applies to

Who follows this SOP.

Triggered when

What event or schedule starts this procedure.

3. PREREQUISITES

Tools, access, template files, or information that must be ready before step 1.

4. PROCEDURE

Each step: an action, then the expected result. Mark decision points clearly (If X, then Y).

Step 1: [Action] -> [Expected result]

Step 2: [Action] -> [Expected result]

Step 3: [Action] -> [Expected result]

Decision point: If [condition], then [action].

Step 4: [Action] -> [Expected result]

Step 5: [Final step] -> [Confirmation process is complete]

5. QUALITY CHECK

How to confirm the procedure was done right. What should be true, visible, or sent when finished.

6. RELATED DOCUMENTS

Links to related SOPs, checklists, or template files used in this process.

7. REVISION HISTORY

[YYYY-MM-DD] | v1.0 | [Owner] | Initial version

Write your first SOP in 5 steps

1. Pick one recurring task

The one you do most often, or that costs the most when it goes wrong. Not the most complex.

2. Do the task while writing every step

Record each action as you take it. Do not reconstruct from memory afterward.

3. Mark every decision point

Every place the next action depends on a condition. These are where undocumented processes break.

4. Add the prerequisites

Look at step 1 and ask what must already be true. Work backward and list those.

5. Set a review date before you file it

90 days is a good interval. Put it in your calendar so it actually happens.

What goes into a good SOP

Title: Specific name anyone recognizes at a glance.

Metadata: Version, date, owner, next review date.

Purpose: One sentence on the outcome it produces.

Scope: Who it applies to and what triggers it.

Prerequisites: What must be in place before step 1.

Procedure: Numbered steps, each with an expected result and any decision branches.

Revision history: A log of what changed and when, so you can trust it.