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SOP Template and Writing Checklist

A fill in template for one standard operating procedure, plus the checklist that makes it work.

Copy the template below for each task you document. One SOP covers one task, end to end. When you finish the draft, run it through the writing checklist on the second half of this document, then test it on someone who has never done the task. Their confusion is your edit list.

The template

Task title

Purpose (why this matters, when it runs)

Scope (who does this, what it covers and does not cover)

Owner and next review date

Tools and access needed

The steps (one action per step, exact names of buttons and screens)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Quality standard (what a finished job looks like)

Exceptions (what to do when the normal path fails)

Escalate to (name or role, and when)

The writing checklist

- [ ] I watched the task being done by the person who does it best
  Never write an SOP from memory of how it should go.
- [ ] Every step is one action, in the order the work happens
- [ ] Buttons, screens, and fields are named exactly
  Not 'process it appropriately'. The actual clicks.
- [ ] Every decision point has a written rule
  Replace 'use your judgment' with the rule you would want followed.
- [ ] The quality standard describes a finished job, with an example
- [ ] Exceptions say what to do and when to escalate instead of improvising
- [ ] A person who never did this task completed it using only this document
  The real test. Fix the document where they stalled, not the person.
- [ ] The SOP is linked from where the work starts
  The help desk, the project template, the tool. Not buried in a folder.
- [ ] An owner and a review date are written on the SOP itself
  Processes change. An outdated SOP is worse than none.

Start with one

Do not document everything at once. Pick the task that interrupts you most, or the one only one person knows, and write that SOP this week. Ten tested procedures beat two hundred untested ones.

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