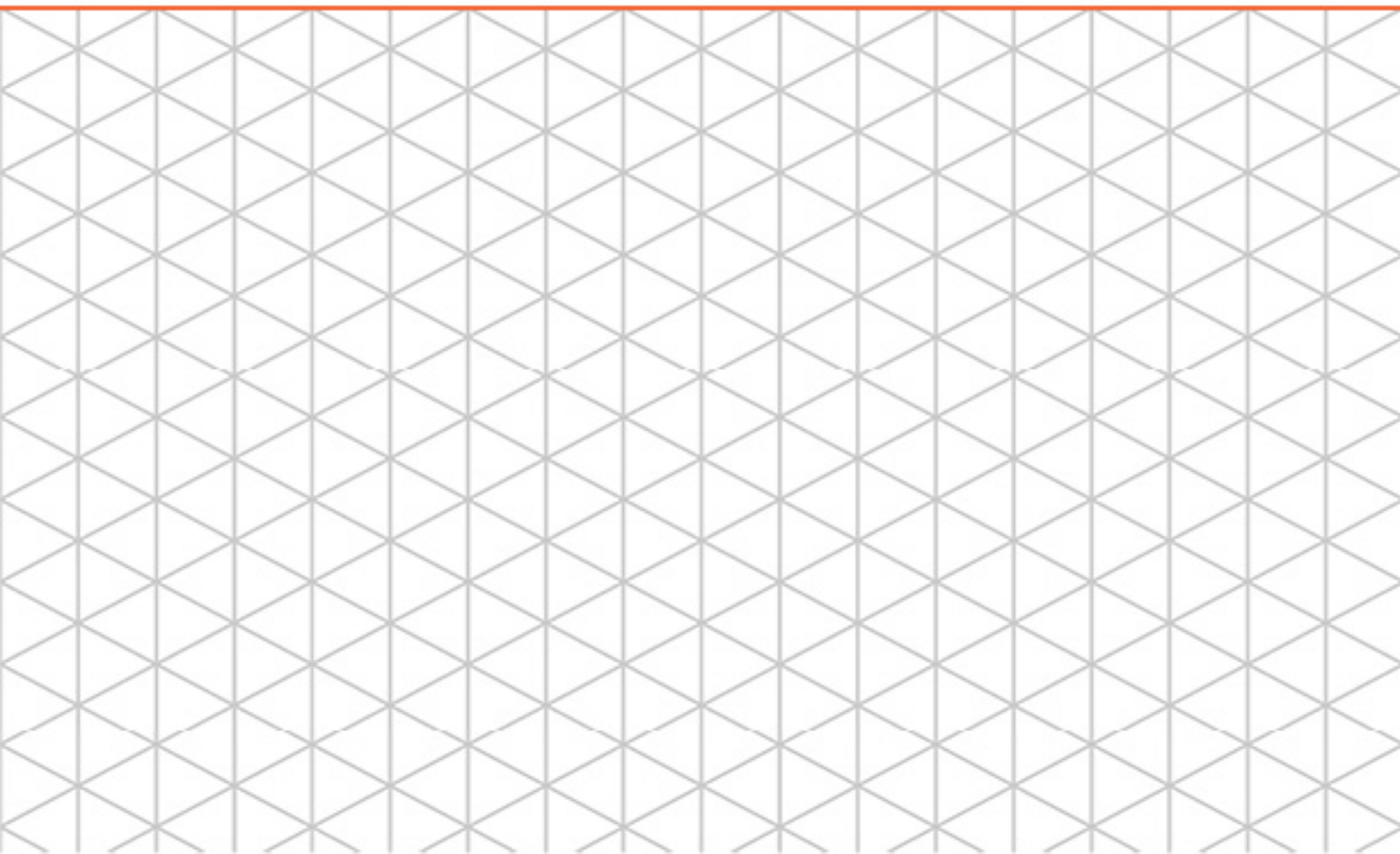


# SOP

## SAMPLE GUIDE



# Standard Operating Procedures Manual Checklist

## Before you even begin

**Start an activity log.** Trying to magically remember everything you do isn't a productive way to go about documenting a procedure. You need a little science! An activity log will reveal the things you'll forget.

Every time you perform a task, jot down the steps you take, along with:

- The time you spent on it—and how long it *should* take
- Exactly who you needed to work with, and their role
- Any unusual variables you encountered that changed the procedure

After a few weeks, you'll have a firm idea of what needs to be fully documented, what you can afford to simply pass on verbally, and a logical order for your manual.

## Documenting a procedure

Lead off with a list containing this information:

- The reasons why following the procedure is important—including what can go wrong if it's *not* followed
- Its priority level compared to other tasks
- Everything the procedure affects
- Everyone who might need to be contacted to complete it
- Every tool that's necessary to have in place before the task begins

Then, use everything in your toolbox:

## CHECKLISTS

These will be the most helpful part of a procedures manual. Make sure each one:

- is written in plain English as if the person using it knows only the very basics of a job (think of one of your intelligent friends who doesn't work for your company—would they be able to follow the procedure as you've described it?)
- is made up of specific action steps that can be checked off as completed—not simply commentary or helpful hints, which should appear different (italicized, in another color, placed at the bottom of the page, etc.)
- does not assume the same staff will always be involved; it's preferable to mention job titles, not the names of those who hold them
- has all the steps of a task in the proper order
- offers contacts for when a problem arises

## VISUALS

Many of us are visual learners, and even those of us who are not use visuals as powerful memory devices. Your handbook should include:

- diagrams
- flowcharts
- photographs
- screenshots

## Wrapping up

- Create signs that can be altered, printed and used again and again
- Make templates (like the one below) that a procedures follower can use to mark their progress
- Save everything in both electronic and paper format
- Create a binder in which each procedure has its own tab, with the most important procedures placed up front
- Insert a table of contents up front
- Finish with a section called Troubleshooting—a sheet containing two or three common problem scenarios for each procedure that you've described (and how to either solve them or find someone who can)

|   |             |
|---|-------------|
| <b>STANDARD OPERATING PROCEDURE FOR</b> |             |
| <i>Created by</i>                       |             |
| <i>Task assigned to</i>                 | <i>Date</i> |
| <i>When is this task performed?</i>     |             |
| <i>How time sensitive is this task?</i> |             |
| <i>Necessary supplies and equipment</i> |             |
| <i>Contacts</i>                         |             |
| <i>Terms to know</i>                    |             |
| <b>Step by step</b>                     |             |
| 1.                                      |             |
| 2.                                      |             |
| 3.                                      |             |
| 4.                                      |             |
| 5.                                      |             |
| 6.                                      |             |
| 7.                                      |             |
| 8.                                      |             |
| 9.                                      |             |
| 10.                                     |             |
| 11.                                     |             |
| 12.                                     |             |
| 13.                                     |             |
| 14.                                     |             |
| 15.                                     |             |
|   |             |
| <i>This procedure revised by</i>        | <i>Date</i> |
| <i>This procedure revised by</i>        | <i>Date</i> |
| <i>This procedure revised by</i>        | <i>Date</i> |
| <i>This procedure revised by</i>        | <i>Date</i> |