

SOP starter pack

Document one recurring task, make its decisions clear and test it with another user.

Use pages 1 and 2 to define the process. Adapt page 3 into a short checklist for use during work. Use page 4 to observe a trial. In Word, type beneath each prompt and duplicate step blocks as needed. On paper, write on the lines.

Define the task

Task name Use a name someone would search for.

Purpose and output What should be achieved and handed over?

Start and end What triggers the task and what counts as complete?

Users and process owner Who performs the task and maintains these instructions?

Approval and version Approver, version, effective date and next review date.

Prepare to start

Inputs and access Required information, tools, permissions and training.

Related instructions Where can users find forms, rules or worked examples?

Set the boundaries

Critical controls Checks or approval limits that must be preserved.

Stop and escalate When to stop, whom to contact and what to do while waiting.

Write the steps

Task name: _____ Version: _____

Use an action, an observable result and a response to a problem. Include the responsible person and evidence when relevant. Duplicate this page for a longer task; keep the sequence and numbering clear.

Step 1

Action and responsible person What happens and who does it?

Completion condition and evidence What should be seen or recorded?

If the result is absent Recovery action or escalation to the named owner.

Step 2

Action and responsible person What happens and who does it?

Completion condition and evidence What should be seen or recorded?

If the result is absent Recovery action or escalation to the named owner.

Step 3

Action and responsible person What happens and who does it?

Completion condition and evidence What should be seen or recorded?

If the result is absent Recovery action or escalation to the named owner.

Confirm the handoff

Output and recipient What record is saved, who receives it and who owns the next action?

Quick task checklist

Task name: _____ Version: _____

Keep only the checks needed during work. Replace the blank entries with specific verifications. Tick an item after the check is performed. Keep the full instructions available for detail and exceptions.

Before starting

- ☐ The correct case and current procedure are identified.
- ☐ Required inputs, access and approvals are available.

Verify the critical steps

- ☐ **Check 1** Write the expected state or value, not simply "checked".

-
- ☐ **Check 2** Write the expected state or value, not simply "checked".

-
- ☐ **Check 3** Write the expected state or value, not simply "checked".

-
- ☐ **Check 4** Write the expected state or value, not simply "checked".
-

If blocked or interrupted

Stop rule and contact Who can resolve the issue or authorize an exception?

Resume safely How will you confirm the current state before continuing?

Before closing

- ☐ Required evidence and the completed outcome are recorded.
- ☐ The recipient and owner of the next action are confirmed.

Case reference: _____ Completed by: _____

Date and time: _____ Exception recorded at: _____

Test the SOP with a user

Choose a suitably trained person who did not write the instructions. Observe the task and record friction. Use a safe trial or simulation where necessary. Revise the process or document, then retest the affected steps.

Task and version tested

Tester observer and date

Choose the cases

☐ Normal case ☐ Common exception ☐ Resumption after interruption

Case and expected outcome Define what successful completion should look like.

Record what happened

Finding the instruction Could the user locate the approved version?

Questions or guesses Which step needed explanation or an assumption?

Blocked or changed steps What information, access or decision was missing?

Result and critical checks Was the output correct and were controls preserved?

Improve and retest

Changes owner and due date Change the instructions, training or working conditions.

Retest result and decision Release, revise and retest, or keep on hold.

Maintenance Review triggers and a route for users to report problems.
