

SOP's Writing Standard Operating Procedures: A Quick How-To Guide From The Journey Companies, LLC

Whether you're starting a business or trying to improve an existing one, you have to understand how things are going to get done. What tasks do you need to do? Who needs to do them? What are the best ways to approach these tasks? Working out how these questions can be answered is the first step toward systemizing your business. The creation of processes and workflows will define the way in which your day to day activities function.

In business, uniform systems work. Creating a Standard Operating Procedure manual ensures that every employee follows every step in a system in the same way, every single time. It simplifies cross-training and new employee onboarding.

Simple, right? Yes... but not easy.

How DO we create these SOPs? What follows is a set of instructions that describes all the relevant steps and activities of a process or procedure.

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Step 1. Write an introduction that speaks directly to the people who will use the manual. Include a brief description of what the manual includes, what readers can expect to gain by using the manual and the best way to use the manual (i.e., read it from beginning to end or use it as a reference to look up procedures as the need arises). Present this process to the relevant stakeholders.

Step 2. Create a simple outline of all of the standard operating procedures you want to include. Since a manual is a group of specific standard operating procedures, make a list of each task you need to cover in the manual. This is accomplished by having each team member make a list of the specific processes in their role, compiled into the outline by the project manager.

Step 3. Build a schedule and timeline to complete the individual SOP's. Create the specific lists in order of complexity. Begin with the easiest SOP's first, to help team members gain momentum.

Step 4. List the first task. To complete an entire manual, you need to start with one task at a time: begin with the first standard operating procedure on your outline. Outline the steps involved in completing the task, then go back and write out the details for each step. Make sure each step is clear and concise but provide enough detail that anyone can follow the instructions.

Step 5. Give the standard operating procedure to someone else to read. Have an employee or someone you know read through and follows the instructions. They can provide valuable feedback if there are steps they could not complete or did not understand.

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Step 6. Write the next standard operating procedure, repeating Steps 3 to 5 for each SOP. Collect these as they are completed, according to the milestones and deadlines.

Step 7. Refine the standard operating procedures based on team feedback. You may need to rewrite, edit or add to the instructions, usually a combination of all three.

Each SOP should be written in the same font and font size. Break long paragraphs into short ones. Use bullet points instead of long sentences but include detail as needed. Add visual aids like flowcharts. Highlight important information, such as using boldface type or italics.

Check SOPs for legibility, readability and comprehensibility.

- Legibility: Is the type large enough and easy to read?
- Readability: Are the instructions simple? Or do the protocols have a preponderance of complex concepts and obtuse words?
- Comprehensibility: Does a reader learn what they need to know to do the procedure correctly?

Step 8. Compile all of the standard operating procedures into a binder or bound manual or electronic file/manual. Include a cover sheet with the name of the manual, a table of contents, the introduction and the standard operating procedures in the order of the table of contents.

Ask employees who are not familiar with the procedures to read the SOPs as well. A reader shouldn't have to do the procedure to know how it's done. Have each set of changes reviewed by the same readers until they are acceptable. Managers who will be responsible for ensuring that SOPs are followed should sign off on them before they are released.