

Standard Operating Procedure

[Name of the task as a verb phrase, for example: Process a supplier invoice for payment]

SOP number	[e.g. SOP-FIN-004]	Version	[1.0]
Department	[Team or function]	Effective date	[YYYY-MM-DD]
Process owner	[Role, then name]	Next review	[YYYY-MM-DD]
Status	[Draft / In review / Approved / Retired]	Approved by	[Role, then name]

1. Purpose

One or two sentences: why this procedure exists and what it produces. A reader should know from this line alone whether they have the right document.

[This procedure makes sure that ...]

2. Scope

Where the procedure starts and stops, who it applies to, and what it deliberately leaves out.

- **Applies to:** [the people, teams, locations or cases this covers]
- **Does not cover:** [related work that has its own procedure]
- **Starts when:** [the trigger, for example: an invoice arrives in the inbox]
- **Ends when:** [the result someone could check, for example: the invoice shows as Scheduled]

3. Roles and responsibilities

Name roles, not people, so the SOP survives staff changes. Include who performs the work, who approves it and who must be told.

Role	Responsibility
[Performer role]	
[Approver role]	
[Role that must be told]	

4. Definitions

Define every acronym, system name or term a new starter might not know. Delete this section if there are none.

Term	Meaning

5. Materials, tools and systems

Everything the performer needs before step 1: software and the access level it requires, files, forms, equipment.

- [System or tool, and the permission the performer needs in it]
- [File, form or template, and where to find it]
- [Equipment or other prerequisite]

6. Procedure

One action per step, starting with a verb. Name buttons and fields exactly as they appear on screen. Put the expected result in the notes so the performer can check their own work.

Step	Action	Owner	Notes and expected result
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

7. Exceptions and escalation

Write each exception as a condition and a response. Say who to contact, and when to stop rather than carry on.

If this happens	Do this	Contact

8. Safety, quality and compliance notes

Warnings, legal or regulatory requirements, data-protection rules and quality checks that apply. Repeat a warning in the step it belongs to.

- [Warning or requirement]
- [Warning or requirement]

9. Related documents

Policies, forms, other SOPs and videos this procedure relies on. Link to them rather than copying their text.

- [Policy, form, SOP or video, with its link]
- [...]

10. Revision history

Add a row every time the procedure changes. Archive old versions rather than deleting them.

Version	Date	What changed	Changed by
1.0	[YYYY-MM-DD]	First version	[Role, name]

11. Approvals

Who reviewed and approved this version. Many teams need this only for audited or regulated work; delete it if you do not.

Role	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

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