

# HOW TO WRITE A STANDARD OPERATING PROCEDURE (SOP)

AN SOP (STANDARD OPERATING PROCEDURE) IS A STEP-BY-STEP GUIDE THAT DOCUMENTS HOW TO COMPLETE A SPECIFIC BUSINESS PROCESS SO IT CAN BE REPEATED EFFICIENTLY BY ANYONE.

## 📌 STEP 1: IDENTIFY A CORE PROCESS TO DOCUMENT

- ◆ CHOOSE A PROCESS YOU REPEAT OFTEN (E.G., CLIENT ONBOARDING, INVOICING, SOCIAL MEDIA SCHEDULING).
- ◆ ASK YOURSELF: IF I HAD TO STEP AWAY TODAY, COULD SOMEONE ELSE DO THIS WITH NO CONFUSION?

## 📌 STEP 2: OUTLINE THE PROCESS IN STEPS

- ◆ WRITE A CLEAR, STEP-BY-STEP BREAKDOWN OF THE PROCESS.
- ◆ USE SIMPLE, ACTIONABLE LANGUAGE (AVOID JARGON).
- ◆ INCLUDE SCREENSHOTS, VIDEOS, OR EXAMPLES IF NEEDED.

## 📌 STEP 3: CHOOSE THE BEST FORMAT

- ◆ WRITTEN SOP: A CHECKLIST OR DOCUMENT OUTLINING EACH STEP.
- ◆ VIDEO SOP: SCREEN RECORDING WITH A VOICEOVER EXPLAINING THE STEPS.
- ◆ FLOWCHART SOP: A VISUAL DIAGRAM SHOWING PROCESS STEPS.

## 📌 STEP 4: USE APPS TO HELP YOU CREATE SOPS

- 🌟 TANGO - AUTO-GENERATES STEP-BY-STEP GUIDES WHILE YOU COMPLETE A TASK.
- 🌟 LOOM - RECORD VIDEO WALKTHROUGHS FOR TRAINING.
- 🌟 NOTION - ORGANIZE SOPS INTO AN EASY-TO-ACCESS SYSTEM.
- 🌟 TRELLO/ASANA - ASSIGN SOP TASKS TO YOUR TEAM FOR EXECUTION.
- 🌟 GOOGLE DOCS/SHEETS - SIMPLE AND ACCESSIBLE DOCUMENTATION FORMAT.

## 📌 STEP 5: STORE & SHARE YOUR SOPS

- ✓ KEEP ALL SOPS IN A CENTRALIZED LOCATION (GOOGLE DRIVE, NOTION, OR A SHARED TEAM FOLDER).
- ✓ TRAIN YOUR TEAM ON USING SOPS FOR CONSISTENCY.
- ✓ UPDATE REGULARLY TO KEEP THEM ACCURATE AS PROCESSES EVOLVE.

🎬 PRO TIP: IF YOU DO SOMETHING MORE THAN TWICE, DOCUMENT IT! THIS IS HOW YOU BUILD A BUSINESS THAT RUNS EFFICIENTLY—EVEN WITHOUT YOU.