

O P E R A T O R G U I D E

How to Write an SOP That Your Team Actually Uses

An SOP is a written, step-by-step instruction for one repeatable task. It exists so the work gets done the same way every time, without you explaining it again.

01 How to write one

- ☐ Name the task. One task. If it covers two, split it.
- ☐ Write the purpose in one sentence. Why this task exists.
- ☐ Name the trigger. What starts the task.
- ☐ List what has to be true before it starts.
- ☐ Write the steps. Start each one with a verb. Name the role, not the person.
- ☐ Write what done looks like. How you know it is finished.
- ☐ Write what to do if something goes wrong.
- ☐ Name the owner. The role that keeps it up to date.

02 Example

Task: Process a customer refund request.

Purpose: Return the money when the request meets the rules, and close the ticket.

Trigger: A refund request arrives in the inbox.

Steps: Check the order date. Confirm it is within 30 days. Process the refund in the system. Email the customer. Close the ticket.

Done looks like: The refund is processed and the customer has the confirmation.

03 Why teams ignore SOPs

- ☐ The SOP is too long.
- ☐ It covers more than one task.
- ☐ The steps name people instead of roles.
- ☐ It was written once and never updated.
- ☐ It sits in a folder nobody opens.

04 How to make it get used

- ☐ Keep it to one page.
- ☐ Put it where the work happens.
- ☐ Review it when the work changes.
- ☐ Name the owner so someone is responsible for keeping it current.

If the team still asks you how to do it, the SOP is not where the work happens.

05 What to do next

Pick one task that you explain more than once. Write the SOP. Put it where the team can find it. That is the start.