

STANDARD OPERATING PROCEDURE

[Name of the task]

SOP title	<i>What this SOP covers, in a few words</i>	Version	<i>1.0</i>
Owner (role)	<i>The role that keeps this up to date</i>	Last reviewed	<i>MM/DD/YYYY</i>
Applies to	<i>Who follows it, and when</i>	Next review	<i>MM/DD/YYYY</i>

1 PURPOSE

One or two sentences: why this task matters, and what goes wrong when it is skipped or done differently.

2 TRIGGER

What starts this task? An event, a request, or a time (for example, "every Monday at 9 AM").

3 BEFORE YOU START

Access, tools, files, or information you need before step 1.

4 STEPS

#	Step (start with a verb)	Who	Tool / link	Check
1				
2				
3				
4				
5				
6				
7				
8				

5 DONE LOOKS LIKE

What exists, or what is true, when the task is finished correctly?

6 IF SOMETHING GOES WRONG

Problem	What to do / who to tell

7 RELATED

Links to related SOPs, templates, or checklists.

CHANGE LOG

Date	What changed	By
	<i>First version</i>	

HOW TO USE THIS TEMPLATE

Write it once. Stop explaining it.

An SOP (standard operating procedure) is a short, written description of how a recurring task gets done, so anyone trained on it can do it the same way. This template keeps each SOP to one page. If yours runs longer, it is probably two tasks, so split it.

- 1. Write it while the task is being done.** Watch someone do it, or do it yourself, and write each step as it happens. Steps written from memory skip the small things that cause mistakes.
- 2. Start every step with a verb.** "Open the order," "Check the address," "Send the reply." One action per step.
- 3. Name a role, not a person.** "Support lead," not "Sam." People change roles; the SOP should still make sense.
- 4. Link, don't paste.** Point to the tool, form, or template in the Tool / link column instead of copying it in, so there is only one version to keep current.
- 5. Say what "done" looks like.** If nobody can tell whether the task was finished correctly, the SOP isn't finished either.
- 6. Plan for the usual problems.** List the two or three things that most often go wrong, and who to tell. That section saves the most interruptions.
- 7. Test it with someone new.** Hand it to someone who has never done the task. Wherever they stop to ask a question, add or fix a step.
- 8. Give it an owner and a review date.** An SOP nobody owns goes out of date. Review it on the date in the header, or whenever the tool or process changes.
- 9. Keep it where the work happens.** Store SOPs in the shared drive, wiki, or tool your team already opens every day, with a simple naming pattern such as "SOP – Team – Task".

Using Google Docs? Choose File → Make a copy to get your own editable version. In Word, save a copy before you edit, and keep this file as your blank master.

The next page shows the template filled in for a common task.

EXAMPLE · STANDARD OPERATING PROCEDURE

Process a customer refund request

SOP title	Refund requests from customers	Version	1.2
Owner (role)	Customer support lead	Last reviewed	01/15/2027
Applies to	Support team, for every refund request	Next review	07/15/2027

1 PURPOSE

Refunds are handled the same way every time, so customers get a clear answer quickly and the books match what was refunded.

2 TRIGGER

A customer asks for a refund by email, chat, or the contact form.

3 BEFORE YOU START

Access to the order system and the support inbox. The current refund policy (linked below).

4 STEPS

#	Step (start with a verb)	Who	Tool / link	Check
1	Find the order using the customer's email or order number.	Support	Order system	Order matches the customer
2	Check the request against the refund policy.	Support	Refund policy	Within policy window
3	If it's outside policy, send the "outside policy" reply and stop.	Support	Saved reply	Reply sent
4	Issue the refund in the order system to the original payment method.	Support	Order system	Refund shows on order
5	Send the refund confirmation reply with the amount and timing.	Support	Saved reply	Customer notified
6	Tag the conversation "refund" and close it.	Support	Support inbox	Tag applied

5 DONE LOOKS LIKE

The refund appears on the order, the customer has a confirmation, and the conversation is tagged and closed.

6 IF SOMETHING GOES WRONG

Problem	What to do / who to tell
The order can't be found.	Ask the customer for the order number or the email used at checkout.
The request is outside policy but the customer pushes back.	Don't refund. Pass it to the support lead with a short note.

7 RELATED

Refund policy · Saved replies: "Refund confirmation," "Outside policy" · SOP – Support – Exchanges

CHANGE LOG

Date	What changed	By
01/15/2027	Added step 6 (tag and close)	Support lead