

Introduction to Writing Standard Operating Procedures



- Define an SOP: clear, step-by-step instructions for routine tasks



- SOPs vs. policies, guidelines, and work instructions



- When a repeatable task truly deserves its own SOP



- Business case: reduce errors, speed up onboarding, ensure compliance



- Course preview: Purpose, Scope, Roles, Steps, and Checkpoints



The Five-Pillar Framework for a Complete SOP



- **Purpose:** Why this procedure matters



- **Scope:** Boundaries and exclusions



- **Roles:** Named responsibility, not individuals



- **Steps:** Imperative, one action per step



- **Checkpoints:** Verifiable pass/fail criteria

Defining Purpose:

Why This SOP Exists



- Craft a one-sentence statement linking the procedure to a business or quality goal



- Replace vague phrases like 'to ensure quality' with specific, measurable outcomes



- Analyze strong vs. weak purpose statements and rewrite weak examples



- Treat the purpose as the 'North Star' guiding all subsequent SOP decisions





Setting Scope: Boundaries and Intentional Exclusions

1

Define in-scope: situations, roles, sites, and products covered

2

Define out-of-scope: what this SOP does not address

3

The fence analogy: scope prevents bloat and misapplication

4

Write scope so readers instantly know if the SOP applies



Assigning Roles: The Accountability Architecture

1



- Use RACI: Responsible, Accountable, Consulted, and Informed

2



- Name roles, not individuals, to survive personnel changes

3

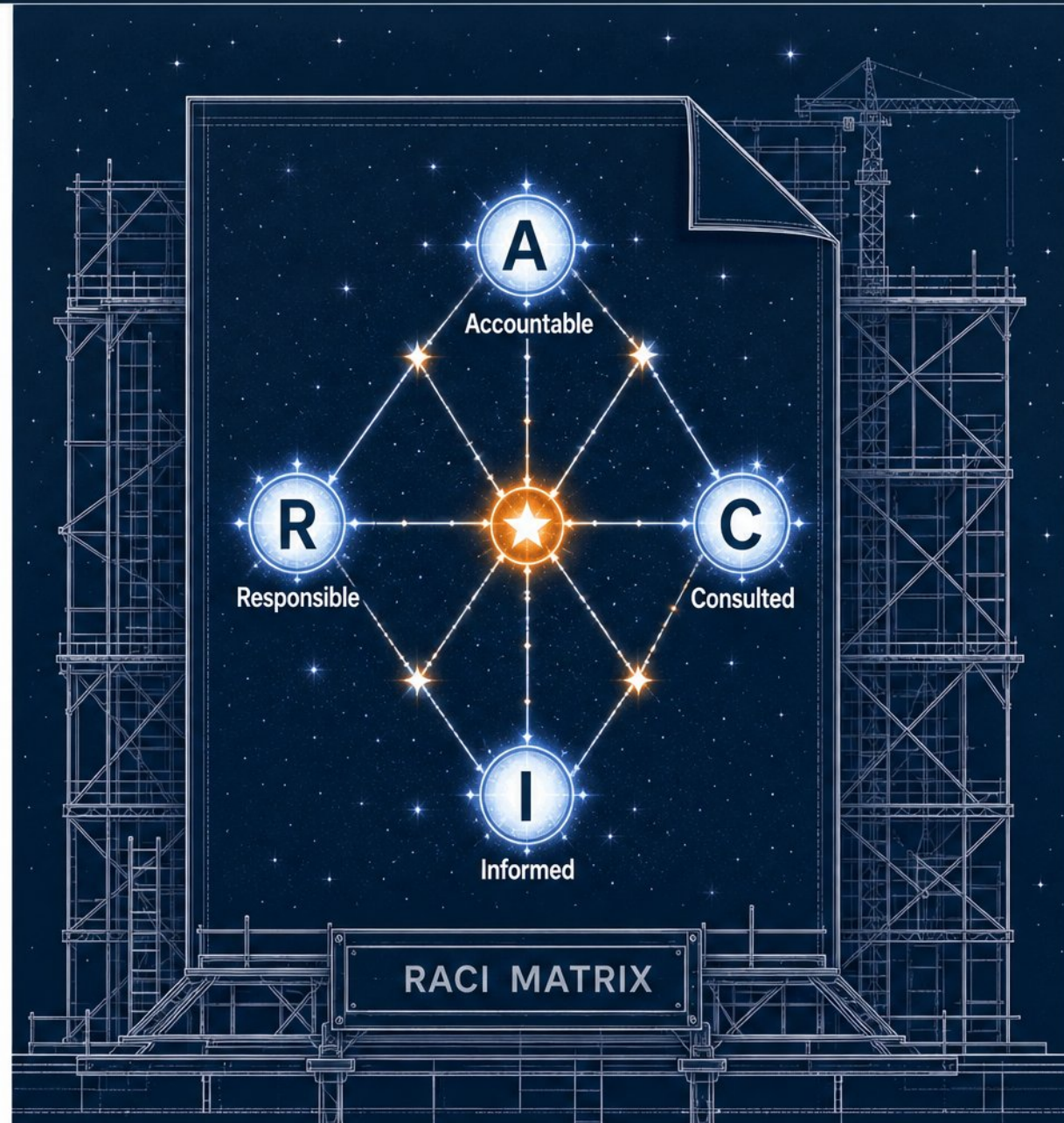


- Assign each role clear, observable, and actionable duties

4



- Template: add a roles-and-responsibilities table to every SOP



Writing Actionable Steps: The Voice of Command



- Every step must begin with a strong, concrete action verb



- Use only one action per step for precise verification



- Order all steps in exact performance sequence



- List prerequisites and warnings before the governed step



- Always maintain the imperative mood; never drift into passive voice

Prepare
Inspect
Connect
Secure
Verify





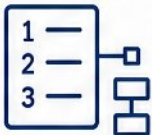
Managing Complexity: Conditionals, Branches, and Decision Points

1



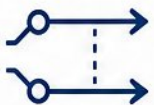
Use 'If X, then Y'
format for
conditional triggers

2



Choose numbered
steps, sub-steps,
or flowcharts
by need

3

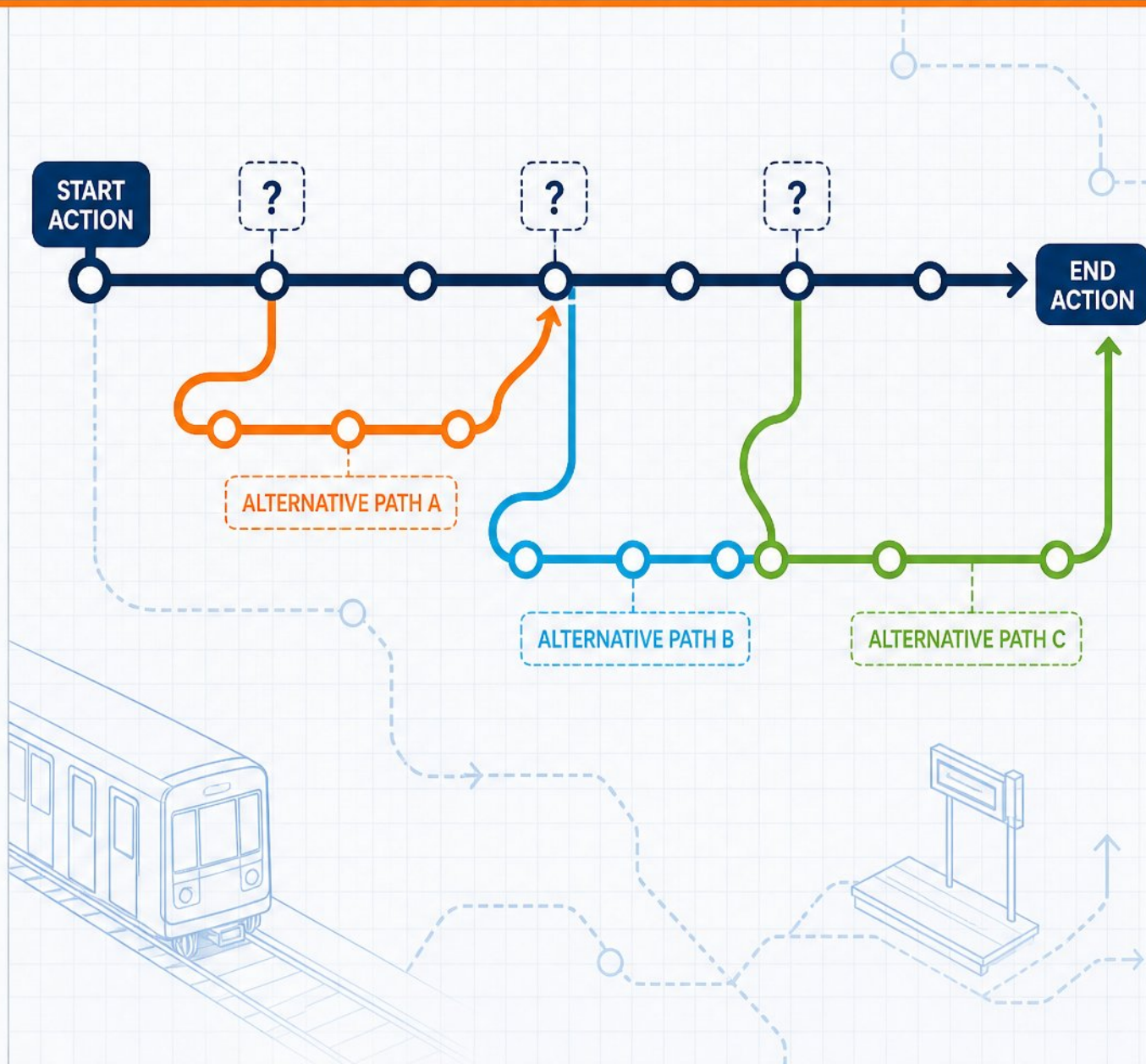


Document parallel
paths to eliminate
guesswork

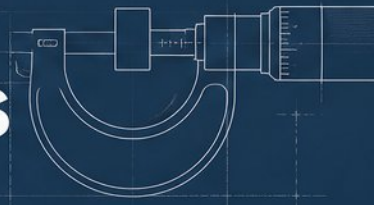
4



Convert branching
logic into clear
linear instructions



Designing Checkpoints and Quality Gates



1



Place pass/fail checkpoints at handoffs and high-risk steps

2



Use objective criteria so anyone makes the same judgment

3



Link each checkpoint back to the SOP's purpose

4



Weak: "check if done" vs. Strong: "confirm temp = 0–4 °C"



Workshop Part 1:

Drafting Purpose, Scope, and Roles



1



Select a repeatable task as your mini-SOP topic

2



Draft a one-sentence purpose statement

3



Define explicit in-scope and out-of-scope boundaries

4



Assign role titles, not individual names

5



Peer review: spot vague purpose and missing exclusions

PURPOSE STATEMENT



SCOPE BOUNDARIES

IN-SCOPE

-
-
-
-

OUT-OF-SCOPE

-
-
-
-

ROLES AND RESPONSIBILITIES



ROLE TITLE



Workshop Part 2: Writing Steps and Checkpoints



1



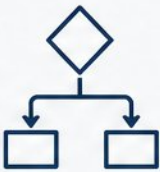
- Write each step in the imperative mood with one action per step

2



- Embed at least two checkpoints with measurable pass/fail criteria

3



- Identify conditional branches and document them cleanly

4

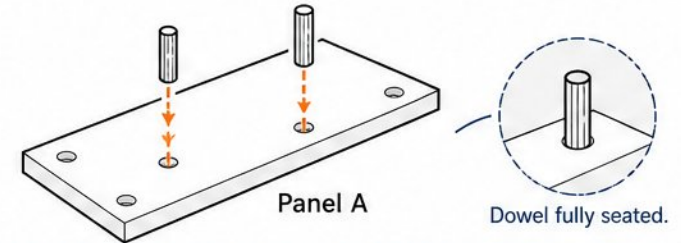


- Review for mood drift, missing prerequisites, and vague checkpoints

1

Insert dowels.

Insert the wooden dowels into the holes on Panel A.



CHECKPOINT 1

Verify both dowels are fully seated.

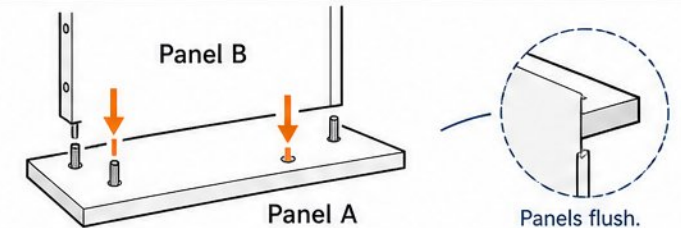
PASS: Both dowels are flush with the surface.

FAIL: Any dowel is raised or missing.

2

Attach Panel B.

Align Panel B with the dowels and slide down until fully seated.



CHECKPOINT 2

Confirm panels are flush and stable.

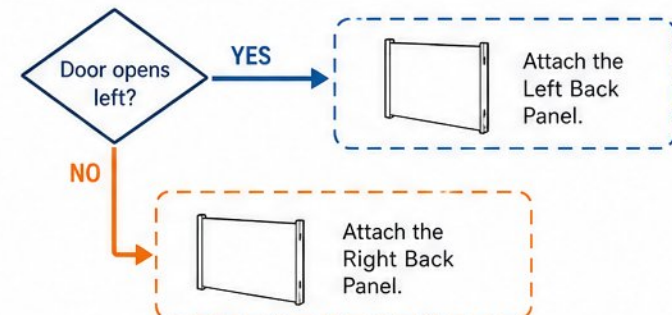
PASS: Panels are flush on all edges and do not wobble.

FAIL: Gaps exist or assembly wobbles.

3

Install back panel.

Determine the back panel based on the opening direction.



SOP Lifecycle: Version Control and Governance



-  - Define full lifecycle: create, review, approve, distribute, train, use, review, revise, retire.
-  - Use major.minor numbering; log effective dates and documented change reasons.
-  - Assign one named owner accountable for accuracy; schedule mandatory periodic reviews.
-  - Archive obsolete versions to keep a single source of truth for audits.

SOP Lifecycle: Approval Workflows and Training Integration



1



Define who signs off, in what order, and each signature's meaning

2



Separate approval date from effective date to create a training window

3



Link training records to SOP version numbers before activation

4



An SOP is "done" only when people are trained, not just approved



From Document to Practice: Adoption and Accessibility



- Go beyond email: use targeted announcements and supervisor talks



- Extract job aids and checklists for quick frontline reference



- Store SOPs in one searchable, role-based centralized location



- Verify through process observation, not just training records



- Build a feedback loop to capture frontline improvement ideas





SOP Standardization: Templates and a Single Source of Truth



- Adopt one template with mandatory fields: ID, version, purpose, scope, roles, steps, checkpoints



- Store all SOPs in a single, authoritative repository – no scattered copies



- Enforce role-based access: separate viewer, author, and approver permissions



- Retire obsolete versions formally: archive with date, never delete for audits





Key Takeaways and Your First 30 Days as an SOP Writer



1



- Crisp purpose, bounded scope, named roles, imperative steps, verifiable checkpoints

2



- Avoid mood drift, missing exclusions, unnamed owners, and weak checkpoints

3



- Week 1: Pick one task and draft a complete mini-SOP

4



- Schedule a peer review and quarterly review reminder immediately

5



- Use provided templates, sample SOPs, and escalation paths



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