

## Standard Operating Procedure (SOP): Tips and Template

### What is an SOP?

A clear, concise and *written description* of how to perform a particular process or task so that the outcome will be efficient, consistent and of the highest quality.

Defined sequence of tasks/steps

An SOP represents the best practice known at a point in time

It's a working document!

### TIPS

When creating an SOP, consider the following:

1. Visual *and* written examples and guides are ideal when relevant
2. Define the "Why" for every step (this can help to prevent work-arounds)
3. Include Definitions: Define acronyms at the beginning of the document and steer clear of jargon
4. Define what the "tools" are that are used throughout the process (ie. Excel, Banner)
5. Always have someone review and attempt to do the work based on the document
6. Assign someone to be responsible for the document; it is a living document and will need consistent review/revision as changes occur!
7. In the document, identify individuals by their title and/or role and not by the name of the individual who happens to serve in that role.
8. Make the document work for *your team!* There is no "right" or "wrong" way to do an SOP as long as it can describe how to perform the process/task in detail.



