The Ultimate SOP Cheat Sheet

Everything you need to make your team follow your Standard Operating Procedures

The Summary

To create processes your team actually uses, make sure you master these three steps:

1. Plan
2. Create and Implement
3. Maintain

Step 1: Plan your SOP creation

Decide why you need SOPs

Select all the reasons for why you need SOPs below

- ☐ **Execution**: want to make sure my team knows how to do things
- ☐ **Onboarding**: I need a tool for onboarding of new team members
- ☐ **Improvement**: I want to have a basis for process improvement
- ☐ **Regulatory**: I need it for regulatory or certification reasons

Decide which SOPs you need to create

1. Make a list of all your processes
2. Given the reasons you selected above, give each SOP a priority

Process Name *List your processes here*	Priority *High/Mid/Low*

Decide on the right format for your SOPs

Pick the right format for your use case. Mix and match categories to find the right approach for you.

Use Case	Text-focused SOPs	Image-heavy SOPs	Video-heavy SOPs
Execution	good	great	good
Onboarding	good	great	great
Improvement	great	good	poor
Regulatory	great	good	poor

Decide on the right tool to store your SOPs

Select the best tool for you below:

Printout / Binder

Pros

- Great if your staff doesn't have access to a computer
- Physical format perceived as valuable and mandatory

Cons

- Hard to use
- Hard to update
- Not feasible for remote or hybrid teams

PDF

Pros

- Accessible on any device
- Known and understood format

Cons

- Not fun to use
- Not interactive
- Hard to navigate
- Hard to maintain

Google Docs

Pros

- Know and understood format (if you're using Google Workspace)
- Easy to create
- Allows for cross-linking

Cons

- Not fun to use
- Hard to navigate
- Not very rich in media types

Notion (our favorite)

Pros

- Fun to use
- Super rich media embedding
- Great to create useful navigation and different view
- Great to add meta information to your SOPs (owner, department, date of next update)
- Can be integrated with onboarding plans
- Great search functionality / AI for information search

Cons

- Might require some training if you’re not used to it
- Additional cost for tool

Other options

- Trainual (great for onboarding and ensuring adoption / acknowledgement)
- Usewhale
- Scribe (great if you’re processes are carried out by one person on a computer, can also be embedded into Notion)

Allocate resources

Lastly, before you start, you need to allocate resources to your SOP creation. Depending on who does it, make sure you have at least 1, better 3-5 hours per week allocated to the effort.

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Step 2: Create and Implement

The best way to make sure your SOPs are being used is involving your team in the creation. There are different ways of doing this.

Set up the tool and develop the template

- ☐ Set up the tool you selected.
- ☐ Have a session with your team to define what your SOP should look like.
- ☐ As a minimum, include the following information:
    - ☐ Who's this relevant for
    - ☐ Who created the SOP and can be contacted for further information
    - ☐ What function or department does this SOP belong to
    - ☐ Use different media types as decided above (image, video)

Create your SOPs

Option 1: Subject matter experts create SOPs

- ☐ Assign subject matter experts for each SOP
- ☐ Map out your priority plan in your task management tool, with deadlines. Aim for 1-2 SOPs finalized per week / person
- ☐ Schedule regular meetings to monitor progress
- ☐ Make sure you're consistent and show your team that this is a priority. Until you're finished.

Option 2: Find a service provider to create your SOPs

There are some excellent companies and freelancers out there that will guide you through your SOP creation.

PRO TIP: We don't recommend creating your SOPs alone. It will increase training efforts and decrease chances of adoption. If you're the one spearheading the SOP creation, at least involve your team by collecting information.

PRO TIP: When working with a service provider, make sure they follow the best practices outlined in this guide.

Train your team on new SOPs

As you finalize your first SOPs, make sure you let your team know.

- Schedule weekly or biweekly meetings to share the latest SOPs with the people they're relevant for
- Answer any questions

Tools like Trainual include a workflow that allows you to notify team members about new SOPs and even have them sign-off on them.

Step 3: Maintain your SOPs

For ongoing use of your SOPs, make sure they stay up to date.

Decide what your update process looks like

Answer the following questions:

- [ ] Who can update your SOPs (everyone, only the owner, …)?
- [ ] How are update requests being processed (update request sent to owner, changes made directly and approved later)?
- [ ] How long are your update cycles, i.e. how often will you review your SOPs

Actively manage your SOPs

If you decide to have scheduled updates (recommended to have that between every 3 and 12 months, depending on how fast your business changes), you need to track these updates somewhere.

Tools like Notion allow you to add meta information to each SOP, with which it is easy to keep track of SOP status and scheduled update.

The rules for engaging your team and implementation apply to updates as well.

We're sure this cheat sheet helps you in starting to implement or improve your SOPs.
For more resources or hands-on support, visit asamby.com