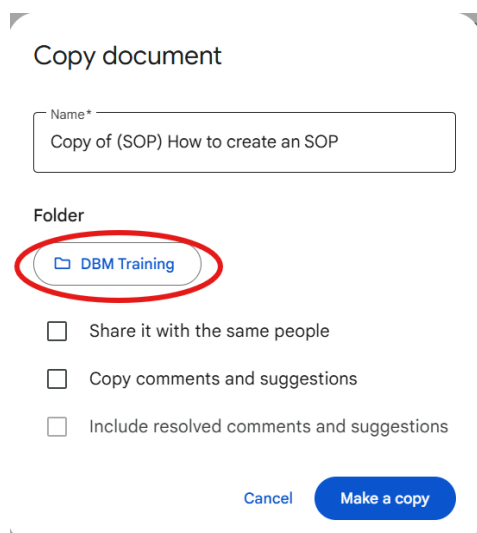


Name of the SOP:	How to create an SOP
Main Owner & Relevant Players:	Kyle Graham Manager, Full team
Created by:	Kyle Graham [Manager]
Last updated:	12/30/2025
Brief Description:	A description of how to create and file an SOP properly to ensure consistency across all team SOPs.
Assets Needed:	• SOP Template found here - Link to template • Access to SOP Playbook Entry form- Link to Playbook Entry Form • Access to loom
Loom Video (if applicable):	

Step by Step Walkthrough:

1. Open the SOP template in Google Docs here - [Link to template](#)
2. Click File>Make a copy, and name your copy the same name as your SOP.
Under the word "Folder", click the button to open to select where you would like it stored.



Copy document

Name*

Copy of (SOP) How to create an SOP

Folder

☒ DBM Training

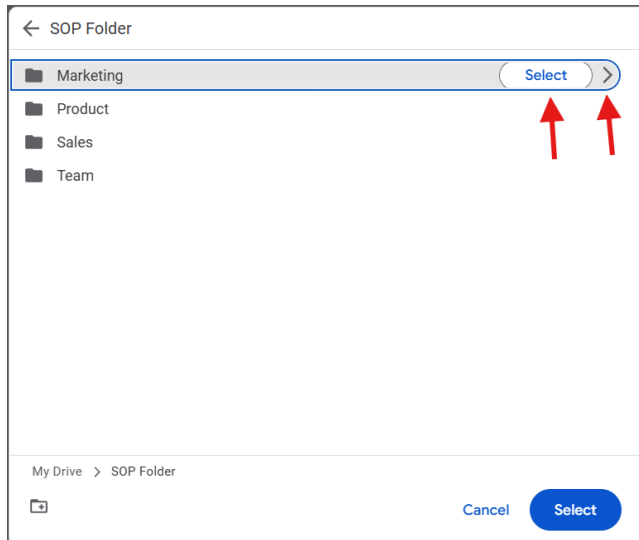
☐ Share it with the same people

☐ Copy comments and suggestions

☐ Include resolved comments and suggestions

Cancel Make a copy

In the popup, find the folder you want (All SOPs will be stored in the “SOP Folder” in Google Drive. Click the arrow to open the folder and see its subfolders. Once you find the most relevant subfolder, click select. If there isn’t a relevant subfolder, consult with Kyle to find the best possible solution.



3. Fill out the top of the SOP form:
 - a. **Name of the SOP:** Add the name of the SOP..
 - b. **Main Owner & Relevant Players:** Add the owner (who is responsible for maintaining it), and the teams it applies to. (e.g. Marketing, HR, Sales).
 - c. **Created by:** You and your role in brackets. (e.g. Kyle Graham [Manager])
 - d. **Last Updated:** Add today's date.
 - e. **Brief Description:** Briefly mention what the SOP is, and why it matters.
 - f. **Assets needed:** Add any access or documents needed to complete the task.
 - g. **Loom Video:** If needed or helpful, shoot a loom of the process and link it here. Plan out your video beforehand so there is no down time in the video.

Try to keep the recording under 3-5 minutes or less when possible.
4. **Completing the Step by Step walkthrough:** Go through your process and list each

step of the process in an orderly fashion by using a number list, and document it on the SOP. As a rule of thumb, anything that requires a click of the mouse, or entry should be listed. Add screenshots to your instructions when helpful.

5. Once you have listed all of the steps, go back through each step and try to picture yourself as having never done this task before. Add any steps that are missing.
6. If specific actions to this task that could be explained better visually, shoot a loom video of the entire process according to our Loom Video SOP found here - [Insert link to Loom SOP](#). **(Make sure to plan out the video by knowing what you are going to say and have all needed tabs open to avoid down time. Try to keep videos 5 minutes or less when possible.)**
7. When the loom video is finished, click the link button next to “Share” at the top left of the screen to copy the link (See screenshot below). Paste the link in the “Loom Video” section at the top of the SOP.
8. Once the SOP is complete, enter it in the SOP Playbook.
Here is the links:
[SOP Playbook](#)
9. Click the + icon to add a new row.

☐	A SOP Name	⌵ Department
1	How to create a SOP	Team Management
+		

10. Hover over the new row name, and I click expand to make entry easier.

☐	A SOP Name	⌵ Department
1	How to create a SOP	Team Management
⋮		
+		

11. Fill out the entry form by completing the questions as follows:

- SOP Name:** Add the same name you called the SOP.
- Department:** Automatically sets to Customer Service.
- Category:** Pick the most relevant from the dropdown. If there isn't a relevant category, let Kyle know.
- Status:** Leave it as draft until manager approves.
- Owner:** Add the owner who is responsible for performing this task and updating the SOP.
- Link to SOP (Doc):** In your SOP Google Doc, go to share in the top right corner. You will get a popup that looks like the following image. Under general access, select "Anyone with the link" in the dropdown, and to the right of that Viewer in the dropdown. It should look like this:

Share "(SOP) How to create an SOP" ? ⚙

Add people, groups, spaces, and calendar events

People with access

Kyle Graham (you)
kyle.graham577@gmail.com Owner

General access

Anyone with the link ▾
Anyone on the internet with the link can view

Viewer ▾

Copy link Done

Now click "Copy link" in the bottom left corner, and paste it in the "Link to SOP (Doc)" box on the entry form.

- g. **Link (Loom Video):** Paste the loom video link from step 7 in this box.
- h. **Last Updated:** Add today's date.
- i. **Occurrence:** Add the frequency of this task in the dropdown.
- j. **Requirements:** List the tools or applications required to complete this task in the dropdown. If any tools are missing, let Kyle know.
- k. **Useful Files:** Optional. Attach any files that may be helpful such as the screen shots you took for the SOP.
- l. **Notes:** Optional if you want to leave a note.
- m. **Tasks:** Link to any relevant tasks that were mentioned on the task tab if there is one.
- n. **Improvement Ideas:** Link to any related improvement ideas mentioned in the Improvement Ideas tab if there is one.
- o. **Common CS Issues:** Link to any common customer service issues if there is one.

12. The creator or main performer of this SOP task will be the owner of this SOP. Every

12 months they will receive a notification to check over the SOP for changes. Once they have verified that it is up to day, they will need to update the "Last Updated" column of of the SOP Playbook to todays date.