Standard Operating Procedure (SOP)

A repeatable guide for any recurring process you run

How to Use

1. Copy this document and rename it with the process name.
2. Replace every **[blue placeholder]** with specifics.
3. Delete sections that don't apply to your process.
4. Review and update every 90 days — outdated SOPs are worse than no SOPs.

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1. Process Overview

Process Name: **[Name of the process]**

Owner: **[Person responsible for keeping this SOP accurate]**

Frequency: **[Daily / Weekly / Monthly / On-demand]**

Last Updated: **[YYYY-MM-DD]**

Estimated Time: **[e.g., 30 minutes first time, 15 minutes with practice]**

2. Purpose

In one or two sentences: what does this process accomplish and why does it matter?

[e.g., This SOP documents how to publish a weekly blog post to the company site. It ensures every post follows the same SEO, formatting, and review standards.]

3. When to Use This SOP

- **Trigger:** **[What event or schedule starts this process — e.g., Every Monday at 9 AM; when a new lead comes in]**
- **Stop conditions:** **[When to skip — e.g., On public holidays; if client has paused the retainer]**

4. Expected Outcome

What does "done" look like? Be concrete.

[e.g., A fully formatted blog post is live on the website, shared to the brand's social channels, and logged in the content tracker.]

5. Video Walkthrough

A 2–5 minute screen recording showing the process end-to-end. Update whenever the process changes.

Link: [Paste Loom or screen recording link here]

Duration: [X minutes] • **Recorded:** [Date]

6. Tools and Access Required

Security reminder: never store passwords in this document. Link to your password vault entry instead (1Password, Bitwarden, LastPass).

- [Tool 1] — Access via: [link to credentials in your vault]
- [Tool 2] — Access via: [link]
- [Tool 3] — Access via: [link]
- [Tool 4] — Access via: [link]

Files and Resources

- [Template file link]
- [Brand guidelines link]
- [Asset folder link]

7. Step-by-Step Workflow

Step 1 — [Name of first step]

[What to do. Write it as if the reader has never done this before. Be specific.]

- [Sub-action]
- [Sub-action]
- [Sub-action]

Step 2 — [Name of second step]

[What to do.]

- [Sub-action]
- [Sub-action]

Step 3 — [Name of third step]

[What to do.]

- [Sub-action]
- [Sub-action]

Step 4 — Final review and completion

[Final checks before marking the task done.]

- Proofread content.
- Test every link.
- Preview on mobile if applicable.
- Confirm notification sent to client or team.

8. Troubleshooting

Common problems and how to solve them. Add new issues here as you encounter them.

Issue: Can't log into [tool].
Fix: Clear cache → try incognito → reset password → contact [Name].

Issue: File won't upload or is too large.
Fix: Compress with TinyPNG or similar → verify file format → try a different browser.

Issue: AI prompt returns wrong output.
Fix: Add more context → rephrase → break into smaller requests.

Issue: Task takes much longer than estimated.
Fix: Review the video walkthrough → check if a step was skipped → document the blocker and ask for help before the deadline.

Issue: Client asks for something outside scope.

Fix: Don't refuse immediately → clarify the request → check with **[Manager Name]** → document in project notes.

Who to Contact

- **Technical issues:** **[Name] via [Slack / Email]**
- **Process questions:** **[Name] via [Slack / Email]**
- **Client-related:** **[Name] via [Slack / Email]**
- **Urgent / after-hours:** **[Name] via [Phone / WhatsApp]**

9. Definition of Done

Check every box before considering the task complete.

- **[Completion criterion 1 — e.g., Content is live and publicly visible]**
- **[Criterion 2 — e.g., All links verified]**
- **[Criterion 3 — e.g., Social posts scheduled]**
- **[Criterion 4 — e.g., Client notified]**
- **[Criterion 5 — e.g., Task closed in project tool]**
- **[Criterion 6 — e.g., Time logged]**

10. Version History

[Date] — **[Name]** — Initial version.

[Date] — **[Name]** — **[Describe change]**