

Standard Operating Procedures

[INSERT SUBJECT HERE] **Last updated:** [Insert Date last updated Here]; by [Insert Name Here]

Purpose

One sentence description of what the SOP is for

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Overview

Summary of the SOP or description of the setup

Key Resources

Outline of links to anything referenced within the process

Definitions

Define any relevant terms within the process.

Stakeholders Involved

Outline of internal and external teams involved in the process and brief description of their role. Note: Please avoid using specific team member names, rather the team they are on.

Stakeholder Name/Team	Description of Role in the Process

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Process

Provide a clear step by step description of the workflow for completing this setup from start to finish. Break the process into logical stages and use numbered lists for each stage so that a new team member could follow it without additional explanation. For each stage, include

- *Stage name and brief summary of the objective*
- *Detailed steps in order, written as action statements starting with a verb*
- *Systems or tools used in that step*
- *Links to sample tickets that illustrate standard work and common edge cases*
- *Screenshots of Admin or other systems where configuration or updates are required*
- *Links to additional supporting documentation such as SOPs, runbooks, templates, or client specific guides*

Replace the placeholder milestones below with the actual stage names, then list the detailed steps under each stage.

- **Milestone 1**
- **Milestone 2**
- **Milestone 3**

Service Level Agreements

Any timelines, turnaround expectations, or performance targets tied to the process

Quality Control *How success is measured, what should be checked, and who checks it to maintain consistency and support audit*

Additional Notes

Anything else relevant not captured above.

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Contributors: [Insert names of those who supported initial SOP creation here]
Additional change history and editor to be further tracked in GoogleDoc/Notion

Reviewers / Approvers

Name	Title	Date