

SOP GUIDE

How to write an SOP people will follow

Read this page once, then remove it. The pages that follow are your SOP.

Policy vs. SOP

A policy is the rule: "All job photos are stored in the project folder." An SOP, or Standard Operating Procedure, is the step-by-step way the work is done to follow that rule. Every SOP should point back to the policy it supports.

Page 1: Document control

Give each SOP a number and a revision (version). The effective date is when people must start following it. Every change gets a new revision number, the date, what changed, and who changed it.

What goes in each section

Purpose. Why the procedure exists, in one or two sentences.

Scope. Who and what it applies to, and what it does not cover.

Definitions. Every term, acronym, or abbreviation a new person might not know.

Responsibilities. Each role involved, including who to contact when something goes wrong.

Safety and cautions. Hazards, required PPE (gloves, eye protection), and steps where a mistake causes damage or injury.

Equipment and materials. Everything needed before starting, so nobody stops halfway.

Procedure steps. One action per step, in the order the work is done.

Quality check. How someone can tell the work was done correctly.

Records. What is written down or saved, where it is kept, and for how long.

References. Related policies, forms, and other SOPs.

Writing rules

Start each step with an action verb: Turn, Record, Inspect. Use active voice and present tense: "Lock the gate," not "The gate should be locked." Mark critical steps and explain why they matter. Add photos or diagrams where words fall short. Cut anything that does not help someone do the task.

Test it, then keep it current

Before you finalize, have someone who does not know the job follow it exactly as written. Fix every place they get stuck. Update the SOP and log a new revision whenever the process changes, review it on a set schedule, and archive old versions.

Train people on it

An SOP only works if people know it. Use the CoursHub Training Planner to turn it into training.

STANDARD OPERATING PROCEDURE (SOP)

SOP title

Document no. Department / area

Related policy

The policy is the rule. This SOP is the step-by-step way the work is done to follow it.

Effective date Review every Next review

Revision history

Rev	Date	What changed	Author

Every change gets a new revision number. Keep only the current revision in use.

Review and approval

	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

1 Purpose

Why does this procedure exist?

2 Scope

Applies to

Does not cover

3 Definitions

Term or acronym	Meaning

4 Responsibilities

Role	Responsible for

5 Safety and cautions

Hazards, required PPE (personal protective equipment), and warnings

6 Equipment and materials

7 Procedure steps

#	Step (start with an action)	Key point / why	Critical
1			☐
2			☐
3			☐
4			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐
11			☐
12			☐

More than 12 steps? Continue on the "Steps continued" page.

8 Quality check

How will someone know the work was done right?

9 Records

What is kept Where How long

10 References

Related policies, forms, and SOPs

7 Procedure steps (continued)

Optional. Print or use this page only if the procedure has more than 12 steps.

#	Step (start with an action)	Key point / why	Critical
13			☐
14			☐
15			☐
16			☐
17			☐
18			☐
19			☐
20			☐
21			☐
22			☐
23			☐
24			☐
25			☐
26			☐
27			☐
28			☐
29			☐
30			☐