



Standard Operating Procedures (SOP) Creation Tip-Sheet

What is a SOP?

A SOP is a set of step-by-step instructions compiled to help staff carry out routine operations. SOP's aim to **achieve efficiency, quality output**, and **uniformity of performance**, while **reducing miscommunication** and **failure to comply** with industry regulations (*if any apply*).

Things to Keep in Mind When Creating a SOP

- Intuitively naming your SOP is crucial!
- If your SOP creates more questions than it does help someone through a process, it needs more work!
- Identify common causes of confusion or troubleshooting in your processes, and include it in the SOP to fill process gaps.
- When referring to a person in an SOP, use position titles, rather than individual names for longevity.
- Create and save your SOP library in a location that is easily accessible to all who need to use it daily.
 - A great place is OneNote, here you can keep SOP's up-to-date, and share with those who need to access them. – *You can also limit access to just viewing or allow full editing access to specific people.*
- SOP's are fluid* and change with the organization – updates can be made, as long as folks agree to follow the new documented processes and procedures.

*Adding to the note that SOP's are fluid, the practice of writing SOP's also in itself creates an opportunity to audit your processes and procedures. As you're documenting, if you realize there are unnecessary or extra steps you/your team have been following for years in each process, update it! (*With a discussion with those impacted, of course*).

How to Prioritize Your SOP's

"I know it's time to create a SOP when..."

- Multiple people in my team or organization are doing this **same process multiple times a day/week/month**.
- My team or organization is asking **the same questions** about **the same processes**, multiple times.
- I am aware that my team or organization is completing the **same process in different ways**, and the outcome is **not consistent** or not meeting the **desired quality**.
- There is a **lack of clarity** around the process itself.

Additional SOP Creation Resources

- [10 Tips for Creating SOPs Your Employees will Actually Reference](#) – (*Forbes*)
- [SOP Management: 2023 Ultimate Guide](#) – (*Extelli*)
- [8 Tips for Developing Standard Operating Procedures \(That Get Used\)](#) – (*Maintain X*)
- [How to Create an Effective Standard Operating Procedure \(SOP\)](#) – (*Helpjuice*)
- The City of Madison – HR Organizational Development unit has templates available for your use, but here are a few other ideas of [SOP templates](#) you can implement in your own teams! – (*ClickUp*)



Looking for additional SOP Support?

We understand that creating SOP's and documenting processes in general can be overwhelming! Get in touch with us at OrganizationalDevelopment@cityofmadison.com for support.