

HOW TO WRITE AN SOP THAT WORKS

Write It Down. Make It Actually Get Followed.

Every field service business runs on processes that live mostly in people's heads – how a job gets dispatched end to end, how a complaint gets handled, how a job closes out and gets invoiced. That's the SOP Gap: the moment the person who knows the process is out, leaves, or hands it to someone new, it gets rebuilt from memory – a little differently each time. A real SOP closes that gap. It doesn't have to be short. A simple task might take half a page. A full process like end-to-end dispatch might run several. What matters isn't the length – it's whether someone who's never done the job could actually follow it.

Six Steps to an SOP People Actually Follow

1 Map the Whole Process Before You Write Anything
Walk the process start to finish first – every step, every handoff between people, every decision point – before drafting a word. For something like end-to-end dispatch, that's intake, scheduling, routing, the technician's arrival, and close-out. Skipping this step is the single biggest reason SOPs end up incomplete.

2 Break Long Processes Into Clear Stages
A multi-step process shouldn't be one dense wall of text. Split it into labeled sections people can jump to. For example, for dispatch, that might mean separate sections for "Job Intake," "Scheduling," "Dispatch," and "Close-Out" – so someone can find the one part they need quickly.

3 Write Each Step the Way It Actually Happens
Document the real, plain-language order work happens on the job – not the idealized version from a training manual nobody follows. In dispatch, for example, that may mean noting who's responsible at each stage and where the job hands off from one to the next.

4 Define What "Done Right" Looks Like at Each Stage
Add a specific, observable checkpoint at the end of each stage – not just at the very end of the whole process. For dispatch, for example, that could mean confirming the technician was notified within a set window, or that the customer received an arrival time.

5 Format It to Be Used, Not Just Read
Headers, numbered steps, and short paragraphs beat dense text every time – regardless of how long it ends up being. Length should match the real complexity of the process. A simple task might be half a page; a full process like end-to-end dispatch might run several.

6 Test It on Someone Who's Never Done the Job
Hand it to a new hire, or anyone unfamiliar with the process, with no extra explanation. If they can follow it start to finish without asking a question, it works. If they get stuck at a specific step, that's exactly where the SOP needs another pass.

Writing one SOP well is a real start – but most field service businesses have dozens of processes like this running at once, each one a small version of the same risk if it's never written down. The Gambit, Dark Horse Works' Operational Compliance System, builds a full SOP Library scoped to your business – so consistency doesn't depend on who trained who, or how long ago.