

SOP STARTER KIT (CHECKLIST + EXAMPLE TEMPLATE)

Use this kit to build your first Standard Operating Procedure (SOP) the right way. This guide includes a checklist to help you structure the process and a fill-in-the-blank example template to get you started immediately.



1. SOP CREATION CHECKLIST

- ☐ Identify the process to document (choose something repeatable and necessary).
- ☐ Name the SOP clearly and specifically.
- ☐ Define the purpose of the SOP — what does it achieve?
- ☐ List required tools, files, or systems.
- ☐ Break the process down into clear, numbered steps.
- ☐ Include timing or frequency if relevant (daily, weekly, upon trigger).
- ☐ Assign ownership — who is responsible for following or updating the SOP?
- ☐ Store the SOP in a central, accessible location (shared drive, training hub, etc.).



2 SOP EXAMPLE TEMPLATE

- SOP Title: [Insert clear name for the process]
- Purpose: [Explain why this SOP exists and what outcome it supports]
- Owner: [Name or role responsible for maintaining this SOP]
- Frequency/Trigger: [When does this process occur? E.g., every Monday, when a new lead is entered, etc.]
- Tools or Resources Needed: [List relevant files, platforms, templates, etc.]
 - Step-by-Step Instructions:
 - Step 1: [Describe the first action]
 - Step 2: [Describe the next action]
 - Step 3: [Continue until the process is fully covered]
- Completion Confirmation: [How do you know the task is done? Is there a file to save, a notification to send, etc.]
- Version Control: [example: Rev A, Rev B, etc.]
- Date Created: [MM/DD/YYYY]
- Last Updated: [MM/DD/YYYY]

2 SOP EXAMPLE TEMPLATE

- SOP Title: _____
- Purpose: _____
- Owner: _____
- Frequency/Trigger: _____
- Tools or Resources Needed:
 - Step-by-Step Instructions:
 - Step 1: _____
 - Step 2: _____
 - Step 3: _____
- Completion Confirmation: _____
- Version Control: _____
- Date Created: _____
- Last Updated: _____



WRAP UP:

If you're ready to take the next step, but want a partner to help you get there, schedule a meeting with us.

We'd love to help.

[Schedule a free discovery session with WOWSuccessTeam](#)

SCAN HERE

