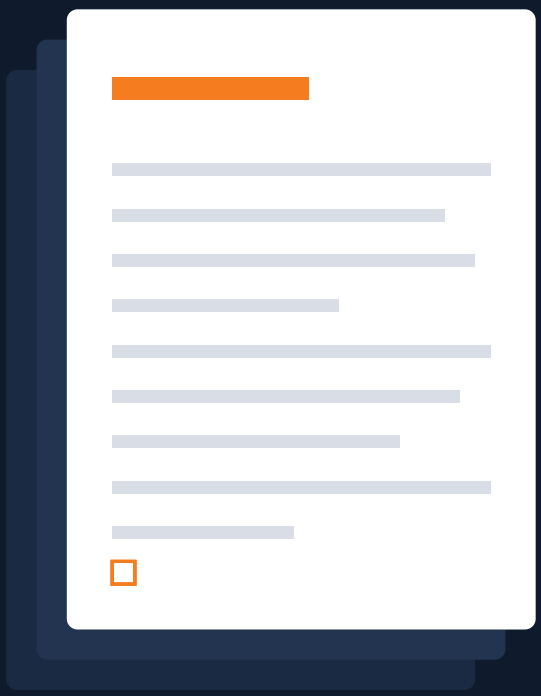
Documentation
Services Lab



FREE TEMPLATE

SOP TEMPLATES

Standard SOP

A full, controlled procedure for core business functions and cross-functional operations.

LEVEL OF DETAIL

High

BEST SUITED FOR

Core business functions, cross-functional operations

About this template

The Standard SOP is the complete format: document control, purpose, scope, roles, prerequisites, a detailed procedure, quality checks, exceptions and records. Use it for processes that many people perform, that carry financial or customer risk, or that auditors will look at.

Detail	
Level of detail	High
Best suited for	Core business functions, cross-functional operations

How to use it

- Replace every *[grey bracketed placeholder]* with your own details.
- Delete the orange **Guidance** boxes and green **Example** boxes before you publish or circulate it.
- Add or remove table rows as needed; keep the section order so readers can find things quickly.

Document Control

SOP title		**SOP number**	
Revision		**Department**	
Process owner		**Approved by**	
Effective date		**Next review date**	

Version	Date	Author	Summary of changes
[1.0]	*[DD/MM/YYYY]*	*[Name]*	*[Initial release]*

01 Purpose

GUIDANCE *One or two sentences on what this procedure achieves and why it matters. Do not describe the steps here.*

EXAMPLE This SOP ensures every new client account is set up correctly within two business days, so billing, access and reporting work from day one.

02 Scope

GUIDANCE *State exactly what is covered and what is not. Clear exclusions stop people applying the SOP to the wrong situation.*

In scope	Out of scope
[Process, location, systems covered]	*[Related processes handled elsewhere]*

03 Roles & Responsibilities

GUIDANCE *Name roles, not people, so the SOP survives staff changes.*

Role	Responsibilities
[Role title]	*[What this role does in the procedure]*

04 Definitions

GUIDANCE *Define any term or abbreviation a new team member might not know.*

Term	Definition
[Term / abbreviation]	*[Plain-language definition]*

05 Prerequisites, Tools & Materials

GUIDANCE *List everything someone needs before starting: system access, training, forms, equipment and reference documents.*

	Item
☐	*[System access / permissions required]*
☐	*[Training that must be completed]*
☐	*[Forms or templates needed]*
☐	*[Equipment or materials]*

06 Procedure

GUIDANCE *Number every step, start each with a verb, and say who does it. One action per step. Put warnings before the step they apply to.*



[Stage 1 name]

#	Action	Responsible	Output / Record
1	*[Verb + action, e.g. Log the request in the ticketing system]*	*[Role]*	*[Record created]*
2			
3			

[Stage 2 name]

#	Action	Responsible	Output / Record
1			
2			
3			

EXAMPLE Step 2.3: Confirm the order date is within the 30-day refund window. Responsible: Support Agent. Output: eligibility noted on the ticket.

07 Quality Control & KPIs

GUIDANCE *Explain how you will know the SOP is being followed and working. Use measurable targets.*

KPI	Target	Measured by	Frequency
[e.g. Processing time]	*[e.g. 90% within 2 days]*	*[Report / audit]*	*[Weekly]*

08 Exceptions & Escalation

GUIDANCE *Say what to do when the normal process does not fit, with a clear trigger and who to escalate to.*

Situation	Action	Escalate to
[Trigger]	*[What to do]*	*[Role]*

09 Records & Related Documents

GUIDANCE *List the records this procedure creates, where they are kept, and for how long. Link related policies and SOPs.*

Record / document	Location	Retention	Owner
[Record name]	*[System or folder]*	*[e.g. 3 years]*	*[Role]*

10 Approval

GUIDANCE *Signatures make the SOP official. Do not use it until it is approved.*

Role	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

Documentation
Services Lab

YOUR TEMPLATE IS READY. YOUR TIME IS LIMITED.

Need this document written, reviewed or formatted for you?

Documentation Services Lab turns your processes, systems and know-how into clear, audit-ready documents your team will actually use. Hand us your notes, recordings or rough drafts and we deliver a finished, on-brand **Standard SOP** and anything else you need.

SOPs & process docs

Standard, checklist, visual and compliance SOPs, process maps, operations manuals.

Technical & API docs

API references, integration guides, manuals, specs and knowledge bases.

Quality & compliance

ISO-ready QMS documents, registers, audit checklists, training records.

Project & construction

Charters, plans, RFIs, submittals, daily reports, closeout packages.

Book a free consultation >

cal.com/documentationservices/inquiry

Visit our website >

documentationserviceslab.com

Free to use and adapt for your own organisation. Remove the orange guidance boxes before publishing.

© Documentation Services Lab