

SOP STARTER TEMPLATE

Document the process so the business doesn't depend on someone remembering how it works.

PROCESS NAME:

OWNER:

LAST UPDATED:

FREQUENCY:

TOOLS REQUIRED:

TRIGGER — What causes this process to begin?

EXPECTED OUTCOME — What should be true when it's complete?

THE PROCESS

STEP 01

Action: _____ Owner: _____ Tool: _____

Notes: _____

STEP 02

Action: _____ Owner: _____ Tool: _____

Notes: _____

STEP 03

Action: _____ Owner: _____ Tool: _____

Notes: _____

STEP 04

Action: _____ Owner: _____ Tool: _____

Notes: _____

STEP 05

Action: _____ Owner: _____ Tool: _____

Notes: _____

STEP 06

Action: _____ Owner: _____ Tool: _____

Notes: _____

BEFORE THIS SOP IS DONE

- ☐ Required approvals received
- ☐ Files saved correctly
- ☐ CRM/system updated
- ☐ Necessary communication sent
- ☐ Next action assigned

☐ Process officially closed

SOP HEALTH CHECK

Could someone else follow this without asking me what I meant?

☐ **Yes** ☐ **Almost** ☐ **Absolutely not—we need to fix this.**

CEO-ISH BEHAVIOR

If the process only works when you remember how to do it, you don't have a process yet.

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Your business doesn't need more busy.
It needs better operations.