

New SOP Distribution Checklist

Use this checklist to walk through the steps of creating and maintaining effective and comprehensive standard operating procedures (SOPs) for your organization.



STEP 1: PLAN

- ☐ Identify all stakeholders in the process. This could include managers, employees, and technical advisors; you'll need a wide variety of knowledge and expertise to write an effective SOP.
- ☐ Identify the specific results and/or outcomes you would like to achieve through these procedures.
- ☐ Identify any long-term business goals associated with the SOP.
- ☐ Identify a way to measure your progress toward these goals (i.e. benchmarks, revenues, etc.).
- ☐ Set a specific time period in which you will review and revise the SOP—perhaps annually—and add it to your calendar.

STEP 2: FIRST DRAFT

- ☐ Observe the process from start to finish, and document the steps as they are currently implemented
- ☐ Consider the appropriate format for describing the process (i.e. flowchart, hierarchical, graphic, etc.)
- ☐ Walk through the documented process step-by-step, describing each decision an employee will need to make and which action will follow in order to achieve the outcomes determined in step one. Don't forget to use visual aids and diagrams to help clarify process order and steps.

STEP 3: READ, REVISE, REPEAT

- ☐ Provide stakeholders with a copy of the first draft and offer opportunities for them to give input.
- ☐ Ask stakeholders to suggest improvements to anything that seems unclear, inaccurate, or inefficient.

- ☐ Encourage all feedback, both positive and negative; this makes your SOP more effective, but stakeholders are more willing to accept changes that they have been engaged in creating.
- ☐ Identify employees that seem especially knowledgeable or tuned-in to the purpose of the SOP; these folks can be great champions of organizational change when rolling out to the rest of the company.
- ☐ Solicit input from a few trusted advisors outside of the organization. By asking more objective parties, you might gain feedback you would have missed otherwise.
- ☐ Revise your first draft, and repeat the process of gathering feedback and process data.

STEP 4: TEST

- ☐ Recruit a test group (of both experienced and inexperienced employees) to try and perform the procedure. If the SOP is written well, it will be easy to understand and anyone will be able to complete the process to the desired specifications.
- ☐ Do a few test runs. Flag any steps that seem to be confusing and any steps that appear to give employees pause during the process.
- ☐ Revise the steps that were flagged for improvement. Take care to maintain realistic expectations for the process, clarity of the operational guidance, and avoid over-complicating the process.
- ☐ Repeat and revise as many times as needed.

STEP 5: SPREAD THE WORD

- ☐ Create a final draft of the SOP.
- ☐ Save the master copy in an easy-to-find location; make it accessible to all employees.
- ☐ Post copies of the procedure in the workplace, and distribute them to workers.
- ☐ If necessary, include a copy in the employee handbook.

STEP 6: TRAIN

- ☐ In order to familiarize all stakeholders to the new process, everyone will need to go through training. This reduces misinterpretation and inconsistencies in the workplace—exactly what the SOP seeks to eliminate.
- ☐ Increase stakeholder buy-in by discussing why the new process is beneficial and how each person's role contributes to a larger organizational goal.
- ☐ Provide stakeholders the chance to practice the new process and ask questions.
- ☐ Be generous with encouragement and positive feedback, and be patient as the new processes are incorporated into routine.

STEP 7: REVIEW

- ☐ Remember that review date you set back in step one? Stick to it! Review the SOP regularly and be sure to continuously improve the process for maximum achievement of your goals.

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