



SmartTribes[®]
INSTITUTE 

CULTURE & TALENT PLAYBOOK

Optimize Your Daily Operations Kit

Table of Contents

How to Write a SOP	2
SOP Template	4

How to Write a SOP

Name of Procedure

How To Write A Standard Operating Procedure

Purpose

How to write an effective SOP so that readers are able to complete the task in question and so that all SOPs are written in a similar format for consistency.

1. Outline Your Task

1.1	Before writing your SOP, be sure to outline the major components or steps that are required to complete
1.2	When you have the major components in place, then write the specific actions that are required for each area – be as clear, direct and specific as possible.
1.3	Test your steps to ensure accuracy and completeness.

2. Writing Your SOP

2.1	Open the SOP-TEMPLATE.doc template. (see SOP template on page 5)
2.2	Under the “File” menu, select “Save As” to create a new file for your SOP
2.3	<p>Name your file using the following convention: DEPT-Specific-SOP-Name-MMDDYYYY.doc</p> <p>* DEPT is the specific program or department to which the SOP directly relates – for example, OPs, HR, Finance, MKTG BAM etc.</p>
2.4	<p>Complete the SOP by transcribing the steps outlined in step 1 above into the SOP template.</p> <p>* Each major component should be in its own table for clarity</p>

3. Record a Video SOP if Applicable

If your SOP relates to a computer-based task, it may be advisable to document the SOP in a video recording using Jing (www.jingproject.com)

3.1	Launch JING on your computer
3.2	Open the document or website to which your SOP pertains
3.3	Record a screen capture video (no longer than 5 minutes) while outlining the steps verbally as you go along
3.4	Upload the completed video to the JING servers
3.5	Paste the JING URL in the “Purpose” field of your SOP with a “See Also” reference
3.6	Save the completed SOP file

4. Delete Extra Rows & Tables from SOP Master (if applicable)

4.1	When complete, clean up your SOP document by deleting any extra rows or unused tables from the document
4.2	Save the modified SOP file

5. Upload SOP Document to Box.net

5.1	Visit www.box.net and log in with your unique credentials
5.2	Navigate to the SOP folder (follow the “internal docs” link) and the sub-folder for the specific department of your SOP
5.3	Click the “Upload” button
5.4	In the new window that appears, click “Add Files”
5.5	In the dialog window, locate the SOP file on your computer, then click “Open”
5.6	Click “Upload” to add the file to box.net

SOP Template

Name of Procedure

Purpose

1.	
1.1	
1.2	
1.3	
1.4	
1.5	
1.6	
1.7	
1.8	
1.9	
1.10	

2.	
2.1	
2.2	
2.3	
2.4	

3.	
3.1	
3.2	
3.3	
3.4	
3.5	
3.6	
3.7	
3.8	
3.8	

4.	
4.1	
4.2	
4.3	