



<https://www.beekeeper.io/blog/sop/>

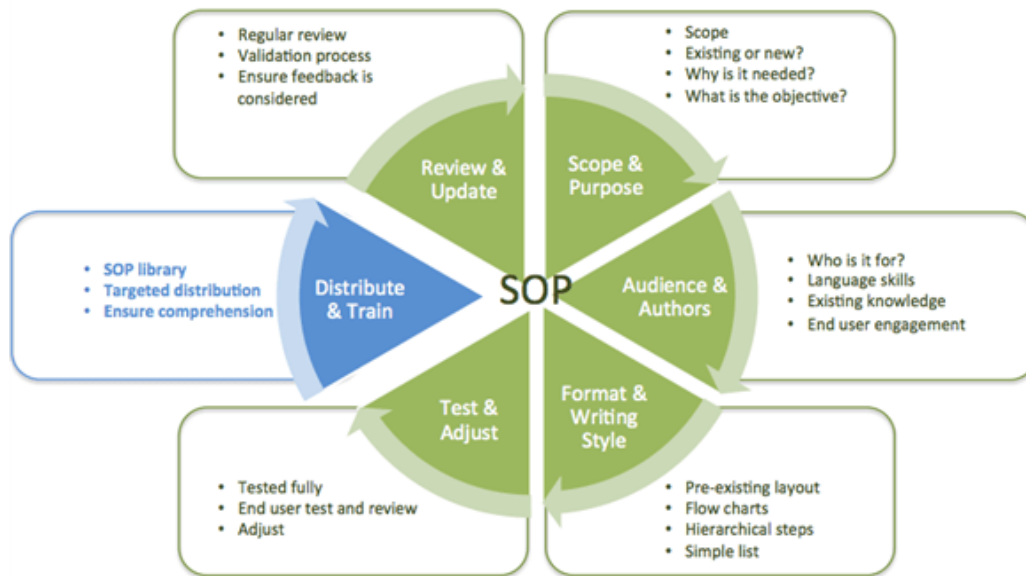
At its core, a business is a series of processes

The go-to for how to get things done

Can be flow charts or checklists

SOP stands for standard operating procedure. SOPs are more than simply a written set of work instructions. A standard operating procedure is a document containing step-by-step instructions to guide employees on how to perform a technical, repetitive process within an organization. Think of it as a playbook for how to get a task done.

SOPs are written for a set of people who will perform the task. Without guidelines, each person might complete the job in his or her own way. The SOP definition is the same no matter what industry you're in. For example, manufacturing companies might write a SOP for employee training to reduce risks and incidents and ensure a safer workplace.



<https://www.techtarget.com/searchbusinessanalytics/definition/standard-operating-procedure-SOP>

Align every worker to the standard way of working in a company to create consistency
Provides clarification for every employee
Result in consistent, superior product or service output
Reduce chances for costly errors due to miscommunication
Stay on schedule
Ensure compliance, i.e. food manufacturers must follow FDA regulations
Reduce product recall rates
Improve operational efficiency
Increase profits

1. Title: Every SOP will have a unique title depending on what it's outlining.
2. Introduction: Some companies like to include a reminder of the organization's mission.
3. Scope of SOP: This section covers the purpose of the SOP and the process it covers and why it's important to follow the enclosed steps, like compliance and/or safety.
4. Contacts: Every SOP should identify who the document is intended for, list roles and responsibilities, and contact information for coordinating personnel.
5. Glossary: If the SOP includes specific language or acronyms, include a glossary of terms.
6. Step-by-step process: This section is where the procedure is broken down into step-by-step instructions with relevant information, like specific equipment used. For some processes, this might be a visual representation, like a flowchart.
7. Checklists: Often, itemized checklists are easier to follow and some SOPs might be better described in this form.

When it comes to operations, what is SOP worthy and what is not? Leaders should determine which processes are complex enough to benefit from written specifications.

At first glance, SOPs might appear to create rigid structures with no room for flexibility. But an SOP simply dictates the maneuvers of a single task. The truth is, that effective SOPs streamline processes to make room for innovation. The more efficient internal processes become, the less money is spent and greater capital is available to put into growth initiatives.

Take Apple, for example. The company pushes the boundaries of design thinking by following strict protocols for task completion. Starbucks was able to grow leaps and bounds by standardizing the simple act of brewing coffee. Customers worldwide come back because of the familiarity and reliability of the process and the product.

TIPS

Walk through the process and break the steps down in sequential order. Make sure you don't forget any steps or information. Walk through the process and break the steps down in sequential order. Make sure you don't forget any steps or information.

Begin instructions with command verbs. For example, "Clean the machine after every use."

Create an SOP template that works for your team and stick with it. This might be a visual guide or flow chart, a bulleted list, or a more formal written report.

In today's workplace, the most effective way to distribute a SOP is through a mobile workplace app which gives every employee access to the document on their mobile device.

Do several trial runs. Test out your SOP by asking subject matter experts, often people who regularly perform this task, run through the steps to .

Unclear SOP. You don't want anyone asking, "so, what do I do?" after reading your SOP. Use action-oriented language in each step-by-step guide.

Convolutd SOP. SOPs are meant to be to-the-point guidelines that are easy to read and easy to follow. Be brief and direct and use visuals and flow charts.

Incorrect SOP. make sure they work with the employees who are intimately familiar with the task so every step is outlined correctly and nothing is missed.

Outdated SOP. Make sure your SOPs are continually reviewed and edited to reflect any changes to the process and procedures within your organization.

Inaccessible SOP. SOPs are only effective if employees can find them!

<https://www.techtarget.com/searchbusinessanalytics/definition/standard-operating-procedure-SOP>

Title page. Lists the title of the procedure, for whom it is intended -- the specific role, department, team or agency -- its SOP identification number and the names and signatures of the people who prepared and approved the manual.

Table of contents. Provides easy access to the various sections in large SOPs.

A step-by-step list of the procedures. Includes explanations of the task's goal, roles and responsibilities, regulatory requirements, terminology, descriptions of what needs to be done to complete each step and a discussion of decisions that must be made. This section will make up most of the SOP.

<https://helpjuice.com/blog/standard-operating-procedure>

Regarding management and maintenance of SOP, there are two main challenges to consider: First, your team will need to be properly trained and prepared as to how to actually implement the procedures in question. This means ensuring they have access to any equipment or other resources needed to complete the tasks defined within the SOP—and that they know how to efficiently and effectively use these resources. If this piece of the puzzle is missing, your team simply won't be able to act in accordance with SOP—no matter how clear the document may be.

It's also worth noting that what's considered the best course of action for the time being may not always be so. Improvements in technology, personnel changes, and a variety of other factors may require your team to revisit previously-developed SOP as time goes on. If the SOP your team follows is outdated or obsolete in any way,

1. Determine Your Goals for Creating an SOP

How will SOP allow employees and teams to work more efficiently?

How will following an SOP allow the team to better serve our clientele?

How will following an SOP impact the company's bottom line?

Be better able to develop absolute best practices

Have a clearer idea of how implementing SOP will affect your organization

Know specifically what to look for when unrolling and assessing SOP over time

You'll also want to identify any pain points or obstacles that currently exist within your organization's processes.

2. Determine the Stakeholders and Creators

3. Define the end-user

Remaining laser-focused on the actual duties of the end-user

Using the correct language and terminology, as expected by the end-user

Explaining certain terminology as needed, while not over-explaining processes and terms that are second-nature to the end-user

4. Determine the Scope and Format of the SOP

As we discussed earlier, an SOP document typically takes one of three forms:

Step-by-step list

Hierarchical list

Flowchart

Depending on the procedures being documented, you'll want to determine which of these formats will be most effective in communicating the desired information. The best course of action here is to go with the simplest format necessary for the circumstance at hand

Title Page

The title page of your SOP should contain identifying information regarding the document, including:

- The SOP being documented
 - The document's unique identification number
 - The date of creation and/or editing of the document
 - The department or professional title of the entity who will implement the SOP
 - The names and titles of the individuals who created the document
-
- **SOP Purpose:** Here, you'll explain your team's rationale for creating the SOP document. This means explaining the high-level and "on-the-ground" impact you hope the SOP to have on your organization, as well as the actual standards to be met by implementing the SOP.
 - **Roles and Responsibilities:** In this section, you'll identify the specific employees or stakeholders to be involved in a given process. Moreover, you'll also define the capacity of these individuals within your organization, as well as the role they play in the SOP in question.
 - **Resources and Materials:** The individuals responsible for completing the procedure will likely need to use a variety of tools, technology, and other materials throughout the process. Here, you'll define what these resources are, and any other necessary information about them (e.g., where to find them within your facilities, how to store them properly, and how and when to request maintenance if need be).
 - **Cautions, Warnings, and Other Hazard-Related Info:** If any safety precautions exist with regard to the aforementioned resources, or to the overall procedure in question, it's imperative that you lay them out clearly, here. This information should also be present within the SOP documentation to follow, with clear indicators of how to find more information if needed.

Methodology and Procedures

This section is, of course, the most important part of the overall SOP document, as it's where you'll describe the actual operating procedures to be followed at all times when completing a certain task.

Using the chosen format, your task here will be to develop detailed, step-by-step instructions for the end-user to follow at every touchpoint. In more simplified cases, these steps will be sequential; in others, the process may involve sub-steps, recursive processes, decision trees, and the like.

Quality Control and Assurance

It's essential that your team members are able to assess their performance with regard to SOP on a case-by-case basis and at specifically-defined intervals over time.

Anecdotes illustrating best practices with regard to a specific procedure

Rubrics or similar means of measuring performance

Samples (real or simulated) of past performance evaluations

References and Glossary

You'll likely refer to a variety of terms, resources, and other documents throughout a given SOP that may require further explanation.

6. Review the Written Document

Once you've written the document in full, you'll want to provide all stakeholders the opportunity to review it for accuracy, cohesiveness, and comprehensiveness.

Throughout this stage of the process, all involved parties should take note of any questions, concerns, or other issues they uncovered while reading through the document. This will allow you to make specific and focused amendments to your SOP before "officially" unrolling it.

7. Train Your End-Users

No matter how experienced or specialized your current team members are, they will need to be trained (and/or retrained) as to the new SOP to be implemented.

This, of course, can be a sensitive area—especially for long-time employees who are used to going about tasks in a certain manner, and who may not yet see the benefits of making the necessary improvements.

For this reason, it's vital that these training sessions occur in a relaxed, no-risk atmosphere. Your team needs to have full confidence that this isn't a "gotcha"-type ordeal; rather, it's to better enable them to put their best foot forward, and to be as productive as possible in their contractual duties.

8. Test and Tweak the SOP in Practice

Piggybacking off the last point, you want to gradually immerse your team in the new SOP (rather than forcing them to dive in).

This may, at first, involve having your team work through the new SOP in a simulated environment. Here, you might set up different scenarios in which certain team members play different roles, allowing each individual to get a feel for the new processes. Or, you might simply discuss hypothetical situations with your team in an open environment, allowing your team to verbally walk through the processes to be completed in said scenarios.

9. Implement SOP—and Revisit Regularly

The "final" stage of the process is, of course, to implement the new SOP in full.

We put the word "final" in quotation marks because, again, what's considered "best practices" in a given scenario is constantly in flux. To be sure, what works best today may be a rather inefficient way to go about doing things mere months from now.

This is why it’s important to instill a growth mindset in your team: They need to understand that the new processes are not set in stone, and will evolve over time as the need arises. Not only do they need to understand this—they also need to be a part of it. As your team continues to adhere to the new SOP, they should regularly take note of any positive or negative experiences they have along the way. Basically, this means noticing areas of improvement, as well as areas in which more improvements need to be made.

How to Handle Customer Complaints For QA / QC

INSERT DATE HERE

By

INSERT AUTHOR NAME AND TITLE HERE

	NAME	TITLE	SIGNATURE	DATE
Reviewed By				
Approved By				

Effective Date	
----------------	--

1. Introduction

1.1 **Purpose:** This Customer Complaint Standard Operating Procedure (SOP) will describe how complaints received are to be handled.

1.2 **Scope:** The SOP applies to all complaints received regarding [COMPANY NAME]'s products and/or services.

1.3 **Responsibilities:**

- All personnel receiving a complaint will record the complaint on the Complaint Record Form
- The Quality Assurance (QA) / Quality Control (QC) department is responsible for issuing a case number to each complaint, maintaining a Complaint Register and a file designated for complaints.
- QA / QC with the help of other departments will perform the necessary investigation regarding the complaint received. [NAME of MANAGER of QA / QC] is responsible for reviewing and ensuring that complaints are appropriately handled, investigated, and appropriate measures are taken in respect of the defective products and to prevent recurrences
- [NAME of DESIGNATED RESPONSIBLE PERSON] will be responsible for notifying any regulatory body involved, if product recall is to be initiated, product deterioration, or any other serious quality problems with a product.

A summary of action will also be created and stored in [COMPANY NAME]'s internal records as well as furnished to the regulatory bodies, complainant, and anyone else involved.

1.4 **Chief/Principal Investigator:** List the name of the person or people who have authored the SOP

1.5 **Definitions & Abbreviations:** Include all relevant definitions and abbreviations for ready reference here.

1.6 **Materials & Equipment:** Are any specific materials or equipment necessary to comply with the SOP? List them here.

1.7 **Cautions, Warnings, and Dangers:** Should users be aware of any cautions, warnings, and dangers for their own safety? If yes, let readers know and use the labels below to get more specific.

Caution: A caution prevents a possible mistake that could result in damage or injury

Warning: A warning alerts against potential hazards to life or limb

Danger: A danger alerts to immediate danger to life or limb

1.8 Change History:

2. Procedure

- 2.1** Complaints may be received from internal or external source and as verbal feedbacks or written feedbacks. Verbal feedbacks may be received in person, through live chat or chatbot, or through a telephone conversation. Written complaints may be received in the form of letters, help desk tickets, e-mails, social media messages, and faxes. Regardless of the means of communication, all complaints will be recorded using the Complaint Record Form.
- 2.2** Complaints can be lodged against either the service or products - appropriate measures should be taken as necessary and all complaints must be reported to [MANAGER NAME of QA / QC].
- 2.3** Complaints against products manufactured and distributed by [COMPANY NAME] may include (but is not limited to) deficiencies of containers, labels, materials, purity, quality of distributed product and adverse product reaction.

Sometimes customers may also request to return a product. In such instances, assessments will need to be made to determine whether it is due to (or can potentially lead to) product quality issues. The case will be handled as a complaint after proper evaluation.

- 2.4** Upon notification of a complaint, [MANAGER NAME of QA / QC] will document the complaint on a Complaint Record Form with the following information:

- * Complaint case number
- * Customer name
- * Customer address
- * Customer number
- * Product
- * Batch number
- * Quantity involved
- * Nature / reasons for complaint

If there is insufficient data, additional information from the originating source should be requested.

- 2.5** QA / QC (with the help of other departments if needed) will immediately initiate an investigation of the complaint. The investigation will include review of the existing stock of the same batch and all relevant documents related to the batch of the product.
- 2.6** If a product defect is discovered or suspected in the batch, other batches will also be checked to determine whether they are also affected. In particular, other batches or products that may contain product from the defective batch (e.g. reworked batch) will be investigated.
- 2.7** If the investigation reveals serious product quality problems and/or the product is potentially the cause of adverse reactions, a recall will be initiated in accordance with [SOP on PRODUCT RECALLS].

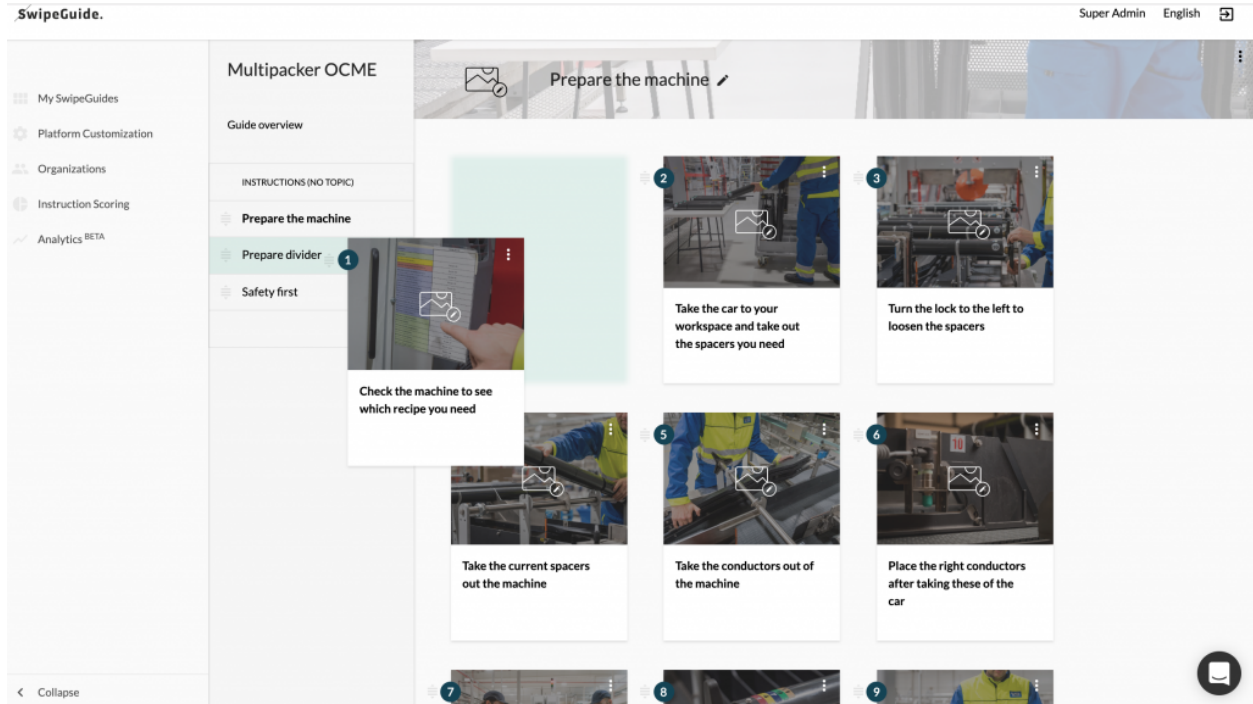
All National Regulatory Authorities (including those where products are exported to) will be informed in the event that a recall is activated.

- 2.8** If the investigation reveals a minor defect which will not effect product quality, corrective action should also be proposed to prevent recurrence.
- 2.9** Investigations will be completed within [TIMEFRAME e.g. 3 days] from the date of receiving complaints.
- 2.10** The outcome of the investigation, any decision or measure taken as a result of the complaint, and the corrective action taken to prevent recurrence should be recorded in the Complaint Record Form and referenced to the corresponding batch records.
- 2.11** All Complaint Record Forms shall be maintained in [company knowledge base, wiki, intranet, etc.] so that it can easily be referenced in future cases.
- 2.12** All complaints will be reviewed as part of the Annual Product Quality Review to determine whether there are specific or recurring problems that may require attention and might justify the recall of marketed products.

3. Change/Revision History Use table below for any new revisions made, date made, person responsible, and well as description of the change.

Revision #	Effective Date	Person Responsible For Change	Description Of Change

<https://www.swipeguide.com/insights/standard-operating-procedures-best-practices-guidelines>



Break down each procedure into individual instructions.
Break down individual instructions into individual steps.
Limit each step to a single action. Use one verb per sentence.

Avoid jargon and stick to your terms

In SOPs, jargon should be kept to a minimum. Use plain, literal language.
Stick to a term once you use it. For example, if you refer to “sterilized bottles” in the first step, use “sterilized bottles” (and not just “bottles”) in follow-up steps.
3. Use active voice and action-oriented language

Start sentences with a verb whenever possible.
Always use active voice instead of passive voice. Active voice: Use the lever to lift the object.
Passive voice: The object should be lifted with the lever.
4. Keep a good flow in instructions and don’t leave critical info for later

Don’t add unnecessary actions where they are not needed, and don’t forget any actions required to complete a task.

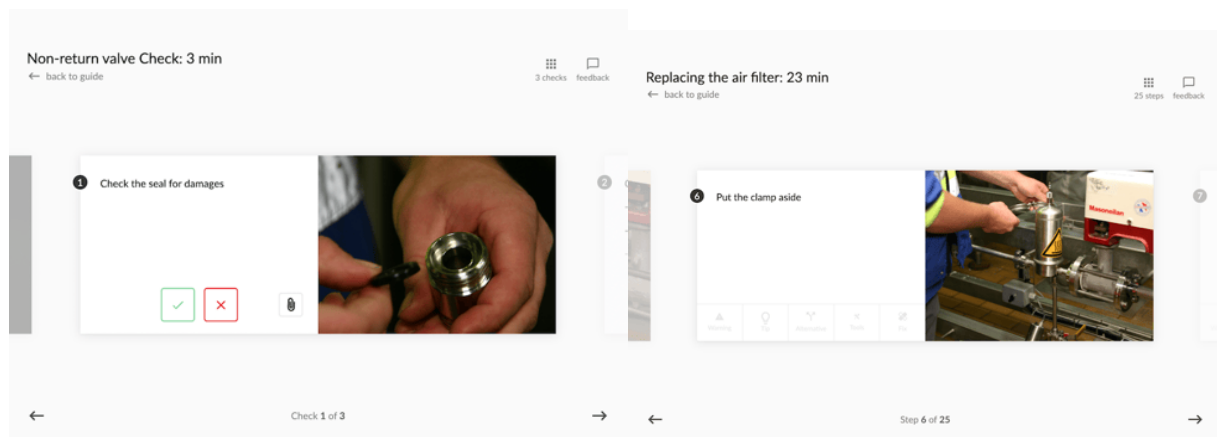
If you need to provide a warning or troubleshooting info, do it when you're explaining the relevant step, and not before or after.

SOP Visuals.

Visuals are extremely important in SOPs. Follow these tips:

Make your visuals as clear as possible: show the action clearly.

Use simple, animated GIFs or short videos when you want to show someone how to do something. Static pictures work best for simple actions like "press a button."



Show context and detail where it's needed. For example, if you need to show how to attach a lock to something, show the lock close up. Or if you want to highlight the tools needed, make sure to clearly show them in the visuals.

<https://blog.bit.ai/standard-operating-procedures-sop/>

Standard operating procedures act as a true north for the employees, guiding them in their journey to do amazing work. It acts as a map that employees- new or old- can follow and expect a positive outcome, every single time.

Step1: Generate a list of your business processes

The first thing you need to do in order to create an SOP is to find out which tasks, processes, or workflows, you need an SOP for. Conduct a survey or ask your employees to fill out a form defining what tasks they do on a regular basis.

This will form the basis of your list for the standard operating procedure (SOP) document. Once you have gathered a list, you can review it with other managers and look for any repetitions.

Step 2: Start with why

Once you have your list ready, it's time to note down your objectives. Having a clear answer to why you are creating the SOP document should be your number one priority. Asking yourself questions like "how will this document help the employees?" or "how will the SOP impact our bottom line?" are great starting points.

For a more granular approach, identify the pain points or challenges your employees face in their day to day and create your SOP around it. This gives you a solid "why" to go through all that hard work of creating an SOP and also improves employee's buy-in in the whole process.

Step 3: Choose a format

Chances are that your organization already has some SOP documents written for past procedures. You can refer to those documents as templates and guide your current SOP.

If not, then refer to our "types of SOP documents" section above and decide whether you want to write a list of steps, create a checklist, create workflow diagrams, or a mixture of everything!

Step 4: Identify your audience

Knowing your audience is key in creating an awesome SOP document. Ask yourself the following questions in order to get an idea about your audience:

Are they new employees?

What's the size of the audience?

What prior knowledge do they have?

Does an SOP already exist?

The more information you have on your audience, the better you can understand their points of view and create an SOP that will be relevant to them.

Step 5: Collaborate with employees

Standard operating procedures (SOP) are written with the end-user, i.e, the employees in mind. Having employees collaborate with you in this process is a no-brainer.

You cannot really understand their pain points and challenges unless you talk to your employees and ask for their honest feedback and suggestions. We recommend using collaboration software like bit.ai to bring your entire team inside a common document and collaborate effectively.

Step 6: Get down to writing

Once you have spoken to your employees and have enough data points to start, immediately move to your document editor and start adding your notes. Once done creating the document, you can go through the document with your employees and management and ask for their feedback and input.

This is also a great time to specify who would be responsible for updating and maintaining the standard operating procedures and when will you be conducting a periodic review to gauge engagement.

Step 7: Make it interactive

While SOP documents are text-heavy and boring, they don't have to be. Add screenshots, screen recordings, images, flow charts, videos- anything that's relevant to the step being talked about.

Media like these can help make your SOP's pop while providing a visual aid to otherwise bland steps. Making your standard operating procedures interactive will boost your engagement levels as employees are surely going to find them more useful and even entertaining!

Step 8: Distribution

After you are done creating the SOPs, you've come to the most essential part of the process: distributing them to your employees. It's crucial to find a place to store all your standard operating procedures (SOP) and other training material in one place for employees to access as and when they like.

This is why we recommend using Bit to store all company documents in one place and store company assets like videos, images, PDFs, and more in Bit's content library. You can quickly

create a workspace in Bit, invite your employees, and share SOPs and more in a robust and safe environment.

Step 9: Make them “living documents”

While many organizations view creating SOPs as a one-time process, that’s hardly the case. As processes and workflows are often changing and ever-evolving in the hopes of making them more efficient, standard operating procedures quickly become outdated.

This is why SOPs should be converted to living documents that get reviewed periodically (ideally after every six months) so that they don’t get out of sync with the process or workflow they are describing.

What an Ideal SOP Document Includes:

The following structural elements are commonly found in most standard operating procedures (SOP) out there:

Title Page: Kickoff your SOP with the title of the procedure, the unique SOP identification number, date of creation or revision, the department/employees/team the SOP applies to, and finally the name and signatures of the parties involved in creating the SOP document.

Table of Contents: Next up is a table of contents. A table of contents helps summarize the document structure and acts as a guide for the reader to quickly jump to sections relevant to him/her. They are particularly helpful if the document is large in size.

Purpose: Describe the goals and objectives of creating the document and how it will benefit the user and the organization.

Scope: Project scope describes the limits of the document and helps the reader understand the boundaries of the SOP. It clearly states what the document is about and what it accomplishes.

Glossary: It’s helpful to include words, abbreviations, or acronyms you may have used in the document that may not be familiar to your audience.

Roles and Responsibilities: Identify key stakeholders (employees, managers) who have to follow this SOP and what responsibilities they would have. This helps avoid confusion and keeps everyone accountable for their actions.

Procedures: This will form the bulk of your SOP document as this section will describe the step-by-step explanations of how to perform tasks and any additional information needed to complete the tasks.

Related Documents: Include a list of related training materials or reference guides to your SOP.

Health and safety warnings: Your SOP should have a separate section describing the things your employees need to avoid and perform the operations in a safe environment. This not only protects your employees from potential dangers but also keeps your company away from liabilities.

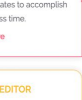
Revision History: Add a revision history to ensure your readers that the SOP they are reading is the latest one.

Approval Signatures: If your company requires an authorizing officer to sign off on SOPs, don't forget to get it approved by them before sharing it with your audience.

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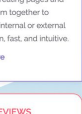
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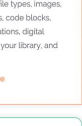
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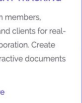
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BUSINESS PLAN TEMPLATE


Acme Company
Any Body, Product X, March 1, 2020

Executive Summary

The executive summary is one of the most important parts of your business plan. It is an opportunity to introduce your plan and your company to your audience. It should be short and snappy and give you the ability to summarize the key points of your plan.

Business plan is an ongoing and iterative work. Your business plan is not a one-time document. It should be updated as your business evolves. It should be a living document that you can refer to as you grow your business.

8/17 PDF - Below you might find the additional 100+ business plan templates. It is intended only for the first and last pages of the plan. The rest of the plan is a template. You can use the template to create your own business plan and save it as a PDF.




Business Overview & Key Objectives

Before the writer to develop your business plan, it is important to include research data and answers to the key questions. The writer should be able to answer the following questions and address the key objectives. The writer should be able to answer the following questions and address the key objectives.

Key Objectives

Based on your plan to create, maintain, and improve goals. This should include a list of the key objectives, a list of the key objectives, and a list of the key objectives.




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Marketing Plan

Provide a summary of your market size, activity, and performance.

Describe your marketing strategy. How do you plan to grow your business? What marketing resources do you plan to use? What do you plan to do? What do you plan to do? What do you plan to do?

The best part should focus on your growing strategy and the ability to manage the risk and manage your goals.




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Competitive Analysis

Compare your competitors from business, customer, market, and product and feature analysis. Include a list of the key objectives, a list of the key objectives, and a list of the key objectives.

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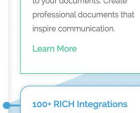
COLLABORATE

Invite team members, contractors, partners, and clients to collaborate in real-time and work together effectively. Create and share knowledge together.

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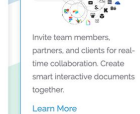
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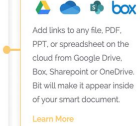
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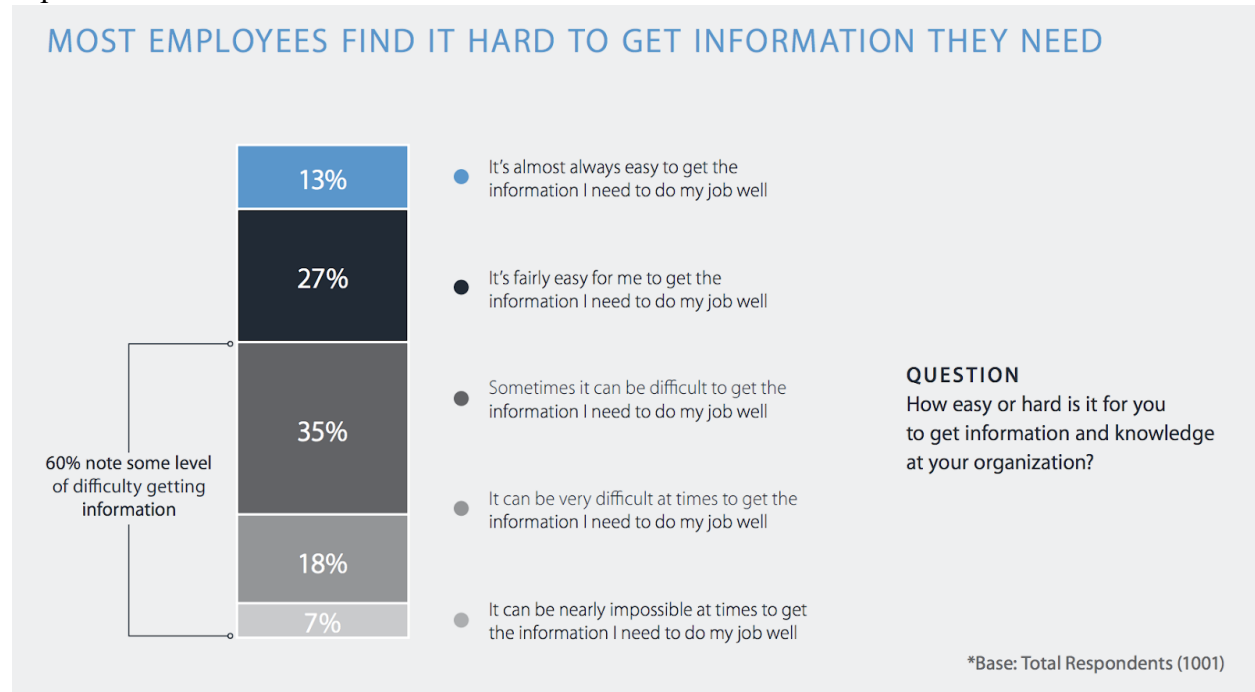
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<https://www.frevvo.com/blog/what-is-an-sop/>



A step-by-step SOP is ideal for more straightforward processes. This format breaks down a procedure into a numbered list and includes detailed instructions for each.

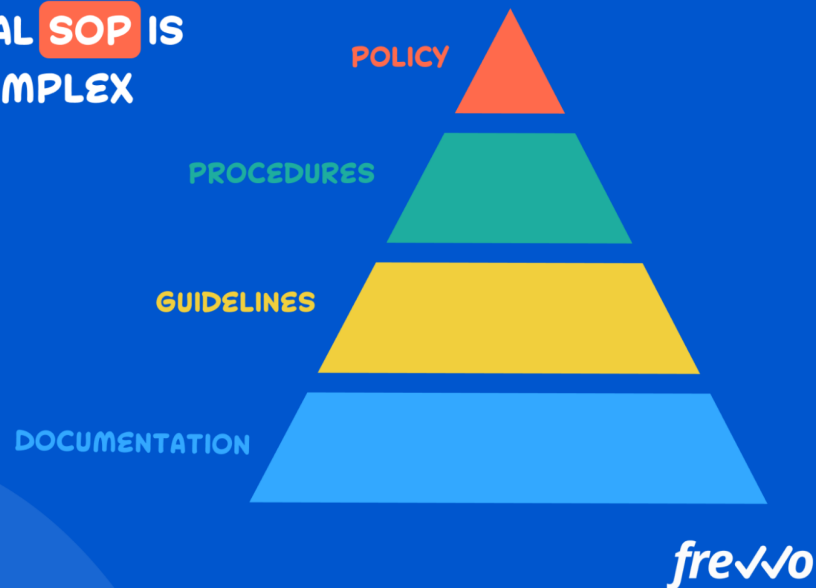
As an example, a step-by-step SOP for processing credit card payments over the phone might include the following:

1. Take the customer's order
2. Ask for personal and credit card information
3. Confirm the total cost with taxes and shipping
4. Key in the payment to the virtual terminal
5. Send the customer a receipt
6. Set up a delivery confirmation
7. Save transaction details

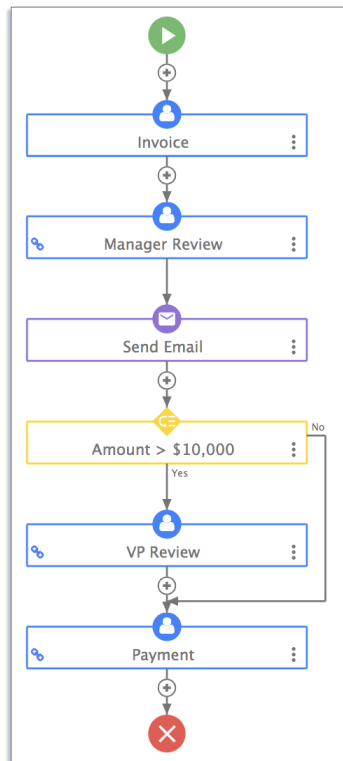
A step-by-step SOP should be simple and clear enough for a new employee to follow without hands-on guidance.

Employees can simply refer to an SOP instead of searching for the information they need to do their jobs. Having established guidelines in place will streamline workflows and improve productivity.

A HIERARCHICAL **SOP** IS IDEAL FOR COMPLEX PROCESSES



- Policy: Establishes the scope of an SOP, including what is (and isn't) covered. This is the "why" of a process.
- Procedures: Outlines the steps to complete a process and roles for those involved. This is the "what" and "who" of a process.
- Guidelines: Provides additional guidance to meet quality standards. This is the "how" of a process.
- Documentation: Establishes a record-keeping system to ensure compliance with internal policies and industry regulations.



You may want to use a flowchart SOP for processes with certain conditions.

As an example, consider a workflow for invoice approvals. Having a senior executive review each one isn't the best use of their time and could even result in a backlog of work.

A flowchart enables you to define conditional logic. In the example above, we have a rule that only routes invoices to a senior executive for review if it exceeds \$10,000. These kinds of conditions help you create more efficient workflows.

1. PURPOSE

1.1 The purpose of this SOP is to establish a process to procure products or services from select suppliers.

2. SCOPE

2.1 This procedure applies to the purchase of all products or services for all departments within the company.

3. DEFINITIONS

3.1 PO = Purchase Order

3.2 VP = Vice President

3.3 Requisitioner = Individual initiating the request for goods

4. REFERENCES AND DOCUMENTS

4.1 Approved Supplier List

4.2 Purchase Order Form

4.3 Quality Inspection Plan

5. ROLES AND RESPONSIBILITIES

5.1 The purchasing department is responsible for procuring goods.

6. PROCEDURES

6.1 Requisitioner creates a purchase order and submits it to a manager.

6.2 Manager reviews and approves the PO.

6.3 VP reviews a PO if it exceeds \$10,000.

6.4 Manager sends the PO to the supplier

6.5 Receive goods and check for quality control

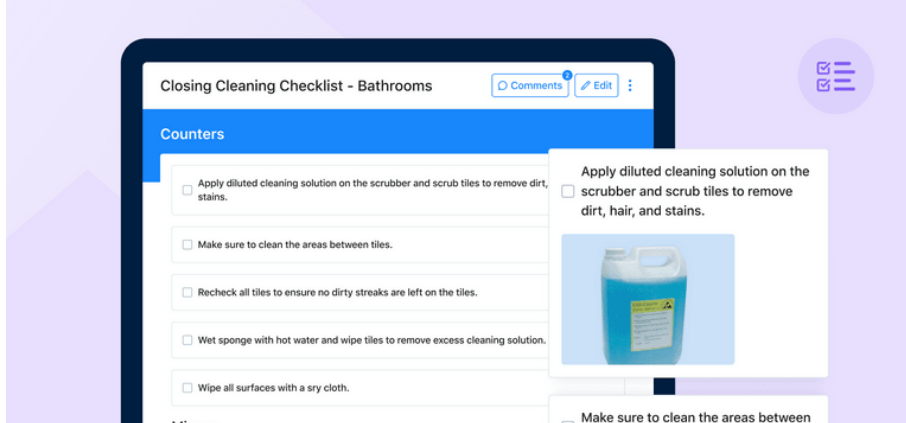
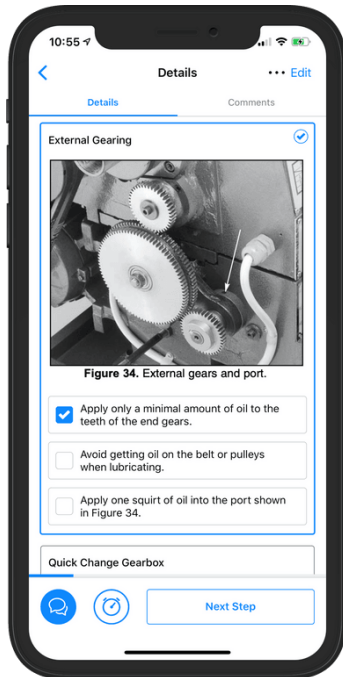
6.6 Receive invoice and authorize payment

6.7 File documents for record-keeping

<https://www.frevvo.com/purchase-order-workflows>

<https://www.frevvo.com/casestudies/ONeil.pdf>

<https://www.getmaintainx.com/blog/what-is-a-standard-operating-procedure-sop-includes-template/>



5 Elements of Standard Operating Procedures (SOPs)

SOPs should contain some form of the following five elements:

1. **Purpose:** The SOP should define the purpose of the work and clearly outline its objectives. Describe the problems the SOP will solve, who the SOP is for, and where and how it will be used.
2. **Procedures:** An SOP not only defines tasks but also provides guidelines for how to complete tasks. Procedures include all of the necessary steps an employee must take in an easily understood format.
3. **Scope:** The scope defines the use and applicability of the SOP.

4. Responsibilities: The SOP should outline who performs the tasks and who to contact if problems arise. It also outlines the person in charge of its implementation, review, and updates.
 5. Accountability Measures: SOPs are intended to improve accountability. Outlining the responsibilities of each person within an organization ensures accountability for assigned projects.
- Quality Assurance: An industry standard for clean water changes. The new inspection must be performed every other day instead of weekly to maintain high-quality water. The SOP needs to account for this temporal change, as well as any changes in the standard of clean water.
 - Task Handovers: An employee is out sick. SOP outlines the specific steps for someone else to take over the employee's scheduled work orders.
 - Quality Management Systems: A manager leaves his role. The company consults the previous manager's written SOPs to streamline the onboarding process. The new hire quickly assumes the new responsibilities with minimal disruptions to organizational productivity.
 - Standardization of Manufacturing Processes: A new piece of equipment replaces old equipment, and the preventive maintenance work order is entirely different. A new SOP will clearly outline the new manufacturing process.
 - Troubleshooting Systems: A hotel guest notifies the front desk that his room's air conditioning unit is broken. The hospitality worker consults the establishment's SOP to quickly resolve the issue satisfactorily.

RESTAURANT SOP TEMPLATE



Restaurant Standard Operating Procedure

COMPANY NAME
Street Address
City, State and Zip

yourwebsite.com

VERSION 0.0.0

00/00/0000

DEPARTMENT RESPONSIBLE

Version History			
Version No.	Current Version Date		
Writer	Effective Date		
Approved By	Expiration Date		
QA Manager	Signature		

REVIEW PROCEDURE

List how often the SOP should be reviewed and updated, and who is responsible.

A call to action

A path

A Code

There are some criticisms of the term "best practice". Eugene Bardach claims that the work necessary to deem a practice the "best" is rarely done. Most of the time, one will find "good" practices or "smart" practices that offer insight into solutions that may or may not work for a given situation.[3]

Michael Quinn Patton jokes in his book about qualitative research and evaluation methods[28] "the only best practice in which I have complete confidence is avoiding the label 'best practice'" and elaborates further

The allure and seduction of best-practice thinking poisons genuine dialogue about both what we know and the limitations of what we know. [...] That modeling of and nurturing deliberative, inclusive, and, yes, humble dialogue may make a greater contribution to societal welfare than the search for generalizable, "best-practice" findings – conclusions that risk becoming the latest rigid orthodoxies even as they are becoming outdated anyway.[28]

Process benchmarking - the initiating firm focuses its observation and investigation of business processes with a goal of identifying and observing the best practices from one or more benchmark firms. Activity analysis will be required where the objective is to benchmark cost and efficiency; increasingly applied to back-office processes where outsourcing may be a consideration. Benchmarking is appropriate in nearly every case where process redesign or improvement is to be undertaken so long as the cost of the study does not exceed the expected benefit.

Best-in-class benchmarking - involves studying the leading competitor or the company that best carries out a specific function.

Operational benchmarking embraces everything from staffing and productivity to office flow and analysis of procedures performed.

Benchmarking software can be used to organize large and complex amounts of information. Software packages can extend the concept of benchmarking and competitive analysis by allowing

individuals to handle such large and complex amounts or strategies. Such tools support different types of benchmarking (see above) and can reduce the above costs significantly.

You will find the following tips helpful when writing standard operating procedures:

1. Always have a specific reader in mind. You should know the type of person who will be reading the procedure. When you know the level of experience of the reader, you can tailor the writing accordingly.
2. Before starting to write, decide the exact purpose of the procedure. For instance, will the procedure serve as a detailed tool for training purposes, or as a summary to provide a periodic refresher? Once you have decided the exact purpose of the procedure, make sure everything you write contributes to that purpose.
3. Use the principle: "Tell readers what you are going to tell them, then tell them, then tell them what you have just told them." Quite simply, this means starting with an introductory paragraph that briefly describes the procedure. This is followed by a complete description of the procedure, using the most appropriate writing technique (paragraphs, bullet points, and so on) to communicate key aspects of the procedure. Finally, a concluding paragraph should be written that summarizes the main points covered.
4. Make an outline of the procedure prior to writing. The purpose of an outline is to establish an orderly relationship between a group of activities. An outline provides a framework for any documentation. When writing an outline:
 - Make a list of topics to be covered. The order is not important, just don't omit anything that you feel is appropriate to the topic.
 - Decide on major groups. Groups may include introduction, responsibilities, safety issues, operating characteristics, background information, and summary.
 - Insert the topics under the appropriate major group.
5. Write the rough draft. Keep in mind that a good procedure is rarely achieved on the first draft. Write rapidly, ignoring spelling, punctuation, and grammar. Write as you talk so you can maintain a train of thought. Write the draft with the outline in front of you to serve as a guide.
6. Revise the draft. Wait 24 hours before making revisions. Revising too soon is less effective because the writer often sees not what is on the paper, but what was meant. Examine what the sentences say, then be willing to rewrite every part of the procedure.
7. Write the final draft. Incorporate all of the latest revisions.
8. Watch for your own boredom. If you become bored as you are writing, there is a good chance that readers will also.

1. Watch for your own boredom. If you become bored as you are writing, there is a good chance that readers will also.

In addition to the preceding tips on writing standard operating procedures, there are pitfalls to avoid, including:

- Vague, meaningless words,
- Excessive words to describe an activity,
- Long, complicated sentences or paragraphs,
- Acronyms, abbreviations, slang, symbols, or other shortcuts of expression that are not clearly defined for the reader,
- Repeating the same points too often, and
- Assuming conclusions are obvious to the reader.

A successful business needs committed workers who complete work procedures consistently and accurately. It also requires all involved to contribute their experience, knowledge, and ideas to constant improvement for the future. This publication describes how dairy businesses can

use standard operating procedures to get everyone driving toward outstanding performance and success.

Most people naturally want to do a good job. Successful managers recognize this fact and seek to channel workers' efforts in ways that will benefit the business. Well-written standard operating procedures (SOPs) provide direction, improve communication, reduce training time, and improve work consistency. The SOP development process is an excellent way for managers, workers, and technical advisers to cooperate for everyone's benefit. A very positive sense of teamwork arises when these parties work together toward common goals.

The level of detail to include in standard operating procedures is one of the most difficult decisions to make.

Procedures definitely should include all steps that are essential and that should be performed the same way by all workers. Omitting any of these essential steps may lead to confusion for the reader or performance variation among different workers. On the other hand, procedures should not be so detailed that they are cumbersome and impractical for everyday use.

Highly detailed procedures cannot take the place of training. Recognizing this, procedure writers should not attempt to answer all possible questions that a worker might have. SOPs should complement and serve as a basis for introductory training. Excessive detail also is likely to cause resentment from experienced workers. They might feel that management is using the SOP to micromanage every aspect of their work performance.

Procedure writers must ensure that they include enough detail to eliminate significant variation among workers.

Here are the ground rules for developing effective procedures.

1. Make them short and to the point. Be specific.

- a. How to operate a piece of equipment.

- b. How to administer a treatment.

- c. How to run a test.

- d. How to do maintenance on equipment.

2. The person who uses the **procedure** is a customer. Write with the customer in mind, not the expert.

3. Develop procedures that can be read and used under stress.

4. Use a simple numbering and identification system.

5. Place procedures where the users can get them.

The last point deserves some elaboration. It may be economical to group the procedures in a central location or to place them on a computer system. This is fine as long as the people who need to get to the **procedure** can do so. If it is difficult to get to the **procedure**, people will not use it and mistakes will come back into the system.

1. Use short sentences.

2. Use active voice. (“Turn the switch” instead of “the switch should be turned”)

3. Be direct. Tell the reader what to do.

4. Use short words. (“Raise” instead of “elevate”)

5. Do not use abbreviations or acronyms.

6. Be consistent with terminology.

7. Do not assume the reader knows something.

8. Put steps in the right sequence.

9. Use headings to help organize information. This helps people find information quickly and understand the flow of the **procedure**.

10. Use 1, 2, 3—not one, two, three.

The objective in **writing** a **procedure** is to give the reader crisp and clear information.

Additional information is usually not a good idea. When extra details may be helpful, or when the reader might need some background information, it should not be buried in the text. Action steps and notes should be laid out in separate columns so that the reader can move quickly through the action steps and be able to refer to notes on an as-needed basis.