



Effective SOP Writing: How to Write a Standard Operating Procedure

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Over the last 30+ years, our team has reviewed thousands of standard operating procedures ([SOPs](#)) written by our clients. We know how difficult and time-consuming it can be to write SOPs, so kudos to you if you have attempted this great feat! Unfortunately, in our experience, the large majority are confusing, disorganized, inconsistent, and often wrong or outdated. That is why we created this helpful guide on how to write a standard operating procedure.

Beyond the actual SOP users, SOP content quality also impacts members of your review team and potentially management and auditors. Did you know that well-written and organized SOPs can slash audit costs by 50% or more?

If you publish SOPs to clients or the general public, the quality of your communication can positively reinforce your brand.

Determining how to write a standard operating procedure is not as hard as some people want to make it seem. If you apply the best practices we share in this guide *and* use the right tool for the job, you can easily produce SOPs that will work for your company.

And there's an added bonus: **you'll significantly reduce the work time, cost, and frustration across all SOP work tasks: writing, reviewing, translating, publishing, updating, tracking, and implementing.**

This guide focuses on writing GOOD standard operating procedures. Still, many of these same principles apply to writing policies, processes, and work instructions (and, frankly, business communication in general). The tips in it will also help you improve and transform any existing SOPs.

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Research-Based and Field-Tested

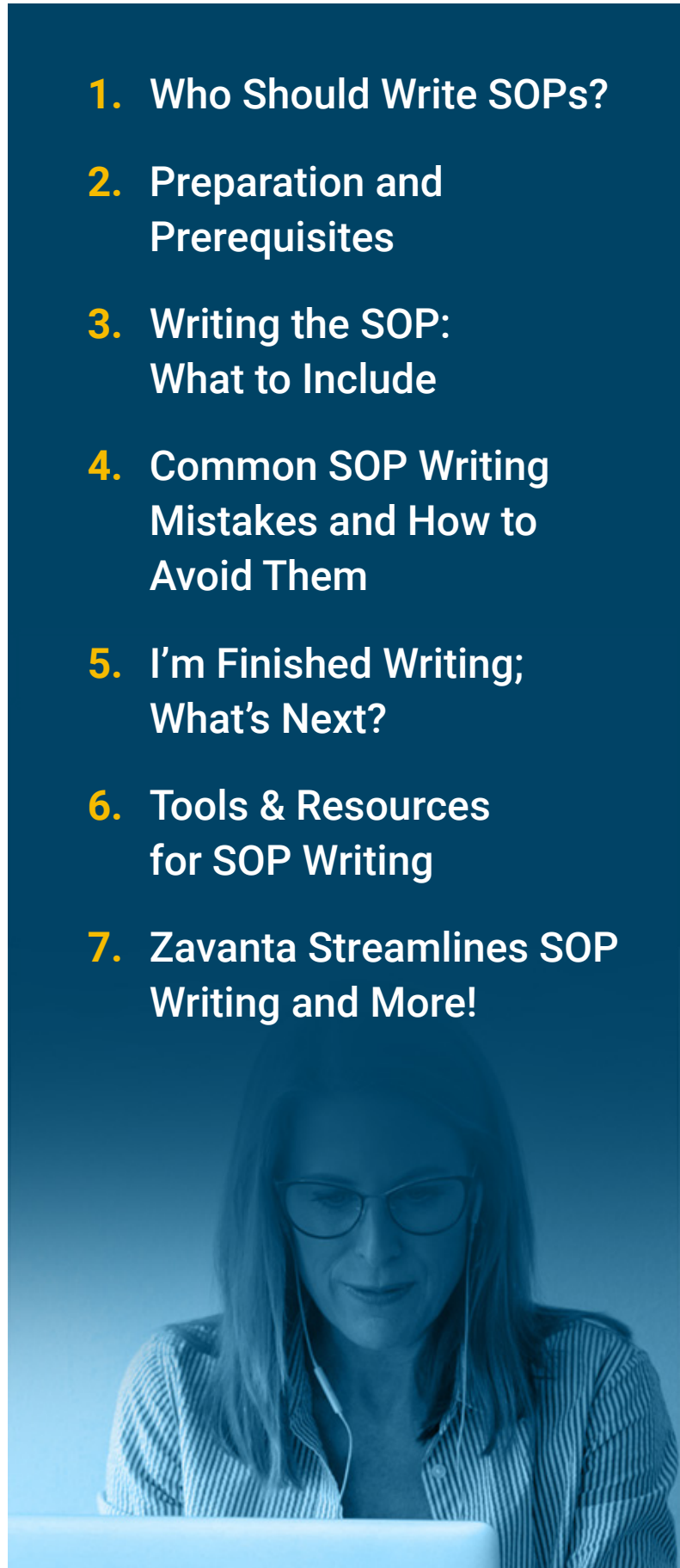
The principles we present are research-based and have been field-tested with hundreds of organizations across all industries. While they are universally applicable, our primary focus is addressing the complex challenges mid-size and large enterprises encounter. Such organizations and their business processes necessitate robust solutions and tools.

SOP Definition: What is an SOP?

Before we begin to determine how to write a standard operating procedure, let's first define what a standard operating procedure is. Essentially, a standard operating procedure (SOP) is a task. It contains steps that must be completed in a specific order. It's more complex than a simple work instruction but smaller in scope than a process.

A common mistake is misunderstanding the difference between policy and procedure/ SOP and mixing them together. It is important that you and everyone in your organization be clear on the difference. Because this is such a stumbling block for so many organizations, we devote an entire blog post to it: [Difference Between Policy, Procedure, Work Instructions](#).

1. Who Should Write SOPs?
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4. Common SOP Writing Mistakes and How to Avoid Them
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Who Should Write SOPs?

Subject Matter Expert (SME) Model

The best answer to the question depends on your organization. We recommend considering what we call the “SME model.” Give your SMEs a structured interviewing tool to develop the content directly. At a minimum, involve them directly and early on.

OK, we’ve heard all the excuses. “Our experts don’t have time,” or “Our people are too highly paid to spend their time formatting SOPs.”

Considering that most people use cumbersome, labor-intensive tools for the job, coupled with the fact that most employees don’t use the official manual anyway, this reaction is perfectly understandable.

Opportunity Cost of SME Time

Think about how often your experts get interrupted by people asking them for help due to poorly written procedures that lack detailed instructions. **What is the opportunity cost for every interruption?**

If your SOPs are incomplete, vague, or inaccurate, your subject experts will spend a lot

of time anyway – answering routine questions for new hires, fixing peoples’ mistakes, or putting out fires. How would you rather they spend their time? People are often astounded at the amount of freed-up time they gain by taking time upfront to transfer their know-how, knowledge base, and lessons learned.

Contrary to popular belief, involving subject experts reduces overall costs. It’s more efficient. It also leads to shorter review cycles of procedure documents.



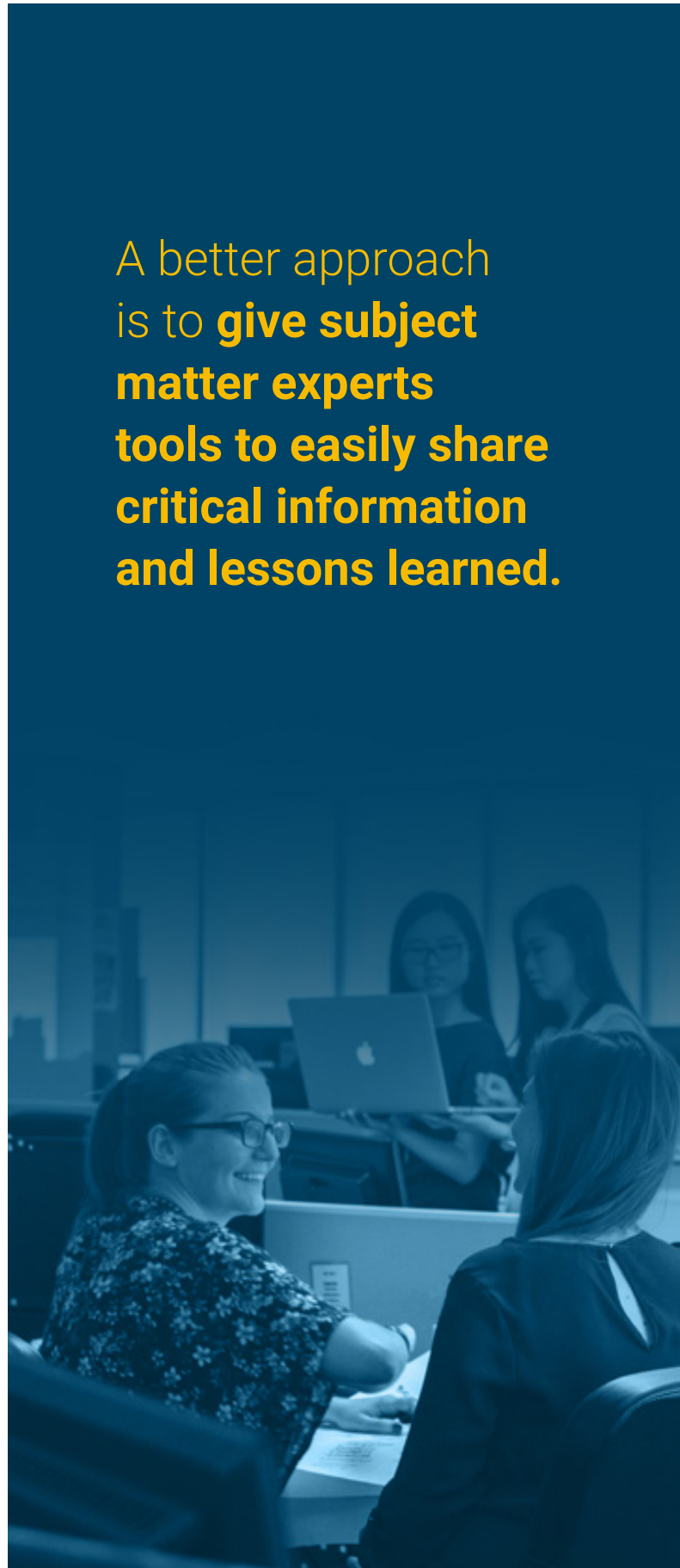
SMEs Need the Right Tools

Consider how most organizations capture knowledge. Someone either guesses the procedure or the subject matter expert dictates the procedure word-of-mouth, and sometimes, someone writes it up. Then that person must repeatedly go back to the subject experts and get them to review the write-ups, validate accuracy, and plug the inevitable holes.

Even if the expert does invest the necessary review time, the holes may never get plugged. None of this activity is tracked or documented. It's easy to see how this development method is inefficient, impractical, and error-prone. With no structure or standardization, you end up with many different formats that can be confusing, disorganized, and incomplete.

A better approach is to give subject matter experts tools to easily share critical information and lessons learned. By involving the right people who know and perform the work, you have a built-in system for re-evaluating processes and continuously improving processes. Consider creating a standard operating procedure template for all SMEs to follow. Include a step-by-step guide with an outline of topics to cover or a table of contents. Or, even better, consider using an SOP software system like Zavanta!

A better approach is to **give subject matter experts tools to easily share critical information and lessons learned.**



Preparation and Prerequisites

Search for Existing SOP Examples

Before you do anything, the first step is to make sure the SOP doesn't already exist or isn't documented in some way. We can't tell you how many times we've spoken to organizations frustrated after they've spent hours and hours on content someone else has already written. This happens even in the smallest of companies.

Duplication has a huge negative impact on users and can be disastrous if someone has to ask: "Which version should I follow?" If your content is organized in a document management system or specialized standard operating procedure

software system, this check should be quick and easy. If you are searching in SharePoint, Google Drive, Box, or something similar, then good luck!

If your company already has different types of SOPs written, you may be able to follow this SOP format.

Assuming a new SOP is needed, there are a few planning steps you should take before you start writing. TIP: We give our clients planning worksheets. You can create these for your own organization. Or better yet, systematize preparation by creating an "SOP Planning" checklist!

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Understand the SOP's Purpose

The most important part of planning is, unfortunately, often the step that most organizations omit.

What is the end goal? What is the *Why*?

People often get so consumed with the work aspects of writing SOPs that they lose sight of WHY they are developing them in the first place. Everyone is told, "Let's get this DONE so we can return to our real work." Nobody writes SOPs for the sake of doing it. When you lose sight of the "Why," the real value is never communicated to the team, let alone management. This mindset is common when there is no link to economic value.

Articulating the value proposition will give you purpose.

It will create a shift in your mindset and elevate the value of all your work (in your mind and the minds of others). It will help focus all your efforts and decisions on the success of the SOP user and what they need to achieve the goal.

Avoid the tendency just to get SOPs done to "check the box." It's better to have 1-2 clear and well-written SOPs that make a difference than 50 that are considered done but don't get used.

Before beginning the SOP writing process, ask:

- "Why is this task important to our company?"
- "What is the desired outcome?"
- "How will it deliver economic benefit?"

Major breakthroughs can come from just one SOP.

- What if it could shave 30 minutes off a routine task that's performed by many people 10, 100 times a month?
- Or give an employee newfound confidence?
- What if a supervisor could regain four hours in their week because they aren't answering routine questions repeatedly?

People often tell us how writing the procedure helped them discover a better way or how it could be automated.



Real Client Examples:

One of our clients was experiencing a high number of returns. Their customer satisfaction rate was plummeting. One individual in the 10-person group was the exception. What was this person doing that was different from other team members? The boss said: "Let's standardize his best practice for the entire team."

They standardized this individual's know-how into an SOP. The result? **\$360,000 saved in one year.**

Or take the IT department struggling to perform a complex, error-prone data conversion routine (that only one person knew how to do). By writing a clear SOP, they were able to transform this onerous task that took 2 days to perform into a two-hour push-button procedure that anyone on the team could now do.

Often, a single SOP is part of an overall system designed to achieve a specific business goal.

Make sure each SOP does its part!

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Understand the SOP User(s)

SOPs exist to be used and followed. If an SOP is not used, it has little value. That's why it's so important to know who you are writing for. Who is your audience?

SOP writers should borrow a page from marketing communications. Why do marketers spend so much time upfront on the target audience analysis and buyer personas? So they can create effective messaging.

SOP communication is no different. Whether it's frontline employees, new team members, senior managers, or specific departments, **a well-defined audience definition ensures that the SOP is user-friendly, relevant, and effectively serves its specific purpose.**

Often, people need an SOP the most at the very moment they are performing their job (just in time). It's essential to understand users' work environment and as much about their world as you can. Below is a table to help you map audience requirements to SOP content requirements.

That's why it is so important to know who you are writing for.

Understanding why people typically consult and follow SOPs will help you write better SOPs.

- They don't know what to do or how to begin.
- They haven't done this specific task in a long time.
- Something went wrong, and they need help.
- They forgot a step or need a refresher.
- New tasks have been added to the procedure.
- They want to be certain they perform the task the right way.



Map Audience Requirements to SOP Content Requirements

Audience	Content Requirements and Considerations
<p>What is their reading ability, background, and educational level?</p>	<p>Language and tone: Write in the language your reader understands best. Offer translations in multiple languages if English is a second language. Consider the difference between verbal and written comprehension.</p> <p>Terminology: Trainees, new employees, or novice users frequently need a definition when you introduce a new term. Experts and technicians are familiar and comfortable with technical terminology; terms rarely need definition. If you want to define terms, include them in a glossary.</p> <p>Diagrams and charts: A technical audience is usually comfortable with technical diagrams, charts, and tables without supporting text descriptions. People who perform day-to-day tasks usually do not need theoretical or design descriptions. They are more interested in the step-by-step “how-to” information. Managers who don’t perform the task but want to understand how it works, i.e., the big picture, will benefit from a process map or flowchart.</p> <p>Images or videos: Including a screenshot of the software being trained or showing a picture of the equipment being explained can be the best way to communicate how to do a particular task. This also supports your bilingual team members.</p>



Map Audience Requirements to SOP Content Requirements Continued:

Audience	Content Requirements and Considerations
<p>Is your audience multinational?</p>	<p>A multi-national audience means your SOPs will probably require translation. You may also want to include more images and diagrams, as mentioned above.</p>
<p>How do they need SOP content delivered? What is their work environment?</p>	<p>These questions drive how SOPs should be formatted. Many organizations are going digital unless the SOP is used exclusively in the field. You may need both online and printed formats. Users may need a QR code for SOP access.</p>
<p>Do any employees deal with disabilities? Will any content need to be accessible to the general public?</p>	<p>Accessibility will be a key requirement. Writing your SOPs may help you uncover the need for special equipment or accommodation to do the work. If you are a government entity, your SOPs may need to be 508 compliant.</p>
<p>What are their time constraints? Are they in front of customers? Back office?</p>	<p>Front-line employees need in-document navigation paths as well as robust search tools. Is the content accessible via a mobile device?</p>



Map Audience Requirements to SOP Content Requirements Continued:

Audience	Content Requirements and Considerations
<p>What are their most common problems?</p>	<p>Are there any specific audience challenges? Organizational challenges? For example, if you want to track that SOP steps are completed, you must ensure there is a way to turn the SOP into a checklist (and write your steps accordingly).</p>
<p>How will people use SOP content? Lookup? Compliance? Training?</p>	<p>It's best to design and write SOPs so that they are multi-purpose. First-time users can get background information. Veteran users can get a quick refresher easily. Managers can train from the SOP.</p> <p>Auditors and regulators can review relevant SOPs quickly. Also, they may need standards and regulations linked to SOPs and proof of adherence.</p>



Respect Your Reviewers

Although not your primary audience, remember that your writing decisions will also impact your reviewers and approvers. If your SOPs are difficult to follow, they will challenge your reviewers and approvers as well. Aside from manual processes, **a top reason review cycles get bottlenecked is procrastination due to content that is overwhelming and poorly written.** Keep in mind that your reviewers are often key executives and managers, and maybe even the board of directors, so they have competing priorities. Give them a clear SOP to review, and they will thank you.

Impress Your Auditors

If the above reasons weren't enough incentive to devote time to learning how to write a standard operating procedure, this benefit is a game changer if you undergo periodic audits and inspections. You can reduce "audit prep stress" and significantly reduce audit costs if your SOPs are well-written and organized.

Auditors and bank regulators alike have told us how usable policy and procedure content is essential for compliance. From their perspective, an SOP exists to ensure employees truly know what to do, not just meet regulatory standards. The DOJ now requires that

organizations be able to prove that their employees are *using* their policies and SOPs. Getting SOPs done just to pass the audit is no longer acceptable (and it never should be).

Many compliance managers tell us that by having clear and well-organized policies and SOPs, they could reduce their audit time and costs by 50% or more. The audit goes faster. The auditor will have confidence that you have compliance systematized.

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What Format Is Needed? How Do SOPs Need To Be Delivered?

Your audience needs will drive your SOP design and layout. All of this depends on the tool you use for SOP authoring.

Typically, you'll want to use some sort of template that has settings for the layout, sections, and fonts. Many companies sell SOP templates. But keep in mind these templates can only do so much. Your authors can still do their own thing.

Programs like Microsoft Word are based on the traditional 8 ½ x 11 printed page. This is fine if your SOP will be printed. If you need to deliver the SOP on mobile devices, you may need your IT department to get involved to properly format your content for mobile devices.

Most organizations we work with need either both or have gone completely digital. **Authors should be able to instantly preview what the document they are working on would look like on a large screen, tablet, phone, or as a printed report.**

Your template should also allow for images and diagrams to be easily inserted and formatted. Some employees will need to have a picture to go along with the step-by-step instructions. Include screenshots from a software program or images of machinery or tools.



Writing the SOP: What To Include

In this section, we'll list the information a typical SOP user needs. In the next section, we'll cover basic writing guidelines and how to avoid common writing mistakes.

If you understand how users interact with SOPs, you can arrange information more effectively and write a better procedure. Keep in mind SOP sections may vary depending on your industry.

The key is ensuring the format and sections are consistent with the SOP's target audience.

You want to avoid "every document is a new experience."

Almost everyone who picks up a procedure requires the following information and wants it in the order described below. **Your SOP should answer all the questions a user will have.**

A common mistake is writing just the steps. Although the steps are key in an SOP, they only answer some user questions.

A note about section order: In most templates, you'll see sections such as Purpose, Scope, etc., at the top. Those sections are useful for first-time performers, for training, and for anyone who needs information such as pre-knowledge. A document control manager might want only to see Revision History (*however, we never recommend that Revision History should come first unless you have a good business reason for it*).

What about the user who just needs the steps? What do you do?

If your SOP will live online, give your reader in-document navigation. Don't force them to scroll and scroll to get where they want to go. With navigation, the user can jump to where they want to go immediately. Some SOP tools will let you personalize the SOP to fit specific user preferences.

If you understand how users interact with SOPs **you can arrange information more effectively and write a better procedure.**



General Information

This section answers the basic questions:

What, Why, Who, and When

Description/Scope:

Answers the important question: **What is the task to be performed? (Do I have the right document? Does it apply to me?)** This information provides a quick reference so the reader will immediately know what the document is about. It should easily distinguish the task from similar tasks to ensure that the reader selects the correct document to use when performing or learning a task. Briefly describe the procedure. You can also include a brief description of who/where it applies.

Purpose:

Answers the important question: **Why is this task performed, and why is it important to do it correctly?** The purpose statement helps the reader immediately understand the reason for performing a task. Knowing the purpose helps people make intelligent decisions and increases the chances that they will pay attention and perform the task correctly. Briefly describe the reason for performing the procedure which this document covers. A good purpose statement captures the expected results and the benefits that the task produces.

Who Performs/Responsibilities:

Answers the important question: **Who should perform this task?** Users need to know immediately if they are responsible for performing this task. You should also include who has overall responsibility for this procedure and make sure it is carried out properly. You may want to outline specific areas of responsibility or simply list the people involved. TIP: In most cases, we recommend using Job Titles here vs. names of individuals. And Job Titles must be standardized.

When Performed:

Answers the important question: **When should I perform this task?** Users must understand the appropriate timing and conditions for performing a task. Many tasks do not happen at a specific time but must be performed when given conditions occur -- such as whenever a customer calls or whenever an error occurs. Make sure to describe the conditions necessary for the task to be performed.

Knowing the purpose helps people make intelligent decisions and increases the chances that they will pay attention and perform the task correctly.



Pre-Requisites

Answers the important question: **Can I do this task? What do I need to know before I start?**

Often, people will attempt tasks without having the necessary prerequisites or without taking necessary precautions. If this happens, they can easily make expensive errors or get themselves (or their companies) into serious trouble.

Use this section to include all the information that users need to know BEFORE they begin performing the task.

NOTE: *Some SOPs may not require everything we list below, but it's important to consider the below sections before you decide to leave them out.*

Required approvals:

List any necessary approvals or signoffs the performer must have before beginning the task. For example, if supervisory or budget approval is required, explain that. If the performer needs security clearance to perform the task, indicate the level and type of clearance required. Be sure to indicate how the approval can be obtained, who to contact, etc.

Pre-knowledge:

List or describe what the user must know or understand before performing the SOP steps

to complete the task correctly and safely. For example, the employee may first need to have completed specific training courses, possess certifications, have a working knowledge of an application, and so on. In short, you assume the SOP user already has the knowledge and accomplished the prerequisites needed to proceed.

Required materials, tools, and equipment:

List any items the user will need on hand before performing the task. There's nothing more frustrating than being in the middle of a procedure and having to stop and go get something you need. Not having what you need before performing a task is a common source of errors and delays. Be sure to indicate how to obtain the items needed. If equipment requires special setup, configurations, or calibrations, be sure also to indicate exactly what specifications and settings to use.



Terminology:

Add terms and associated definitions that users must understand before completing this task.

NOTE: *It is best only to include those terms that users truly need to understand and that are relevant to this specific task. Too many terms and definitions can be confusing and intimidating, so be cautious of overdoing it.*

TIP: *We recommend creating a Company Dictionary as a separate document that contains all the key terms and definitions so that all employees are on the same page. (This will also assist other SOP authors.) You can then pull in the terms that are relevant to this task. A Company Dictionary is an essential tool for new employees.*

General warnings and precautions:

Note overall gotchas or dangers. It is important to warn users of any realistic dangers or potential problems that could occur before they begin the task. This is why it helps if the SME is writing the SOP or is directly involved. They know all the nuances, tricks, and lessons learned. Their experience should be shared.



Detailed Steps

Answers the important question: **How do I perform this task?**

Think through the step-by-step: what you do first, second, third, and so on. Refer to the next section for how to avoid common step-writing mistakes.

Step/Action:

Think of this as the step title. List each action in the order it must be completed from start to finish. Start each action step with a verb. **TIP:** *If you want to eventually turn your SOP into an interactive checklist, make sure to state the step as an action and keep it short.*

Details:

Provide details about how to perform the step. Include any items that will aid the user (i.e. images, videos).

How To Do: Enter a brief description of how to perform this step. You can enter the information in paragraph form, but keep it short. If the instructions to perform this step are complex, it may be better to explain it by breaking up the how-to into substeps under this step. (i.e. 1.1, 1.2, etc.)

Who Performs: Some procedures involve multiple people. Note who does this step or who is responsible for it.

Result: Readers need to know if they have completed a step correctly and what to expect. Indicate the correct result for this step. For example, you will see the “Create a new customer record” pop-up.

Warnings/If an Error Occurs: Like general warnings for the overall SOP, individual steps may have built-in dangers or workarounds. Unless completed properly, they can result in loss or damage of material, equipment, property, or even lives! Be sure to warn readers of any special dangers and explain any precautions. It is important to explain what to do if an error occurs to prevent unnecessary loss of time and materials. Try to think through all the various scenarios. Anticipate any common errors that might occur in this step and explain the best thing to do if they happen.

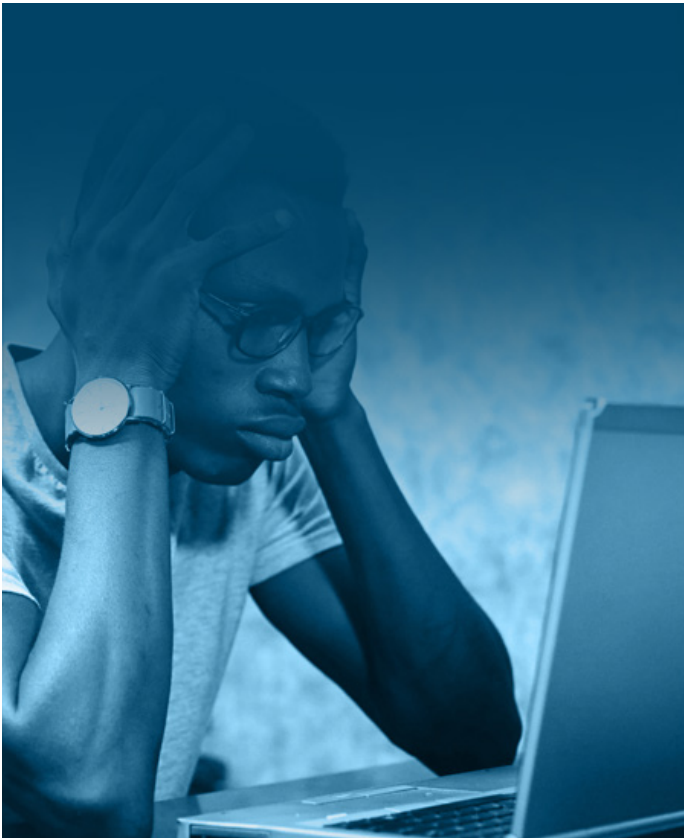
If you want to eventually turn your SOP into an interactive checklist, **make sure to state the step as an action and keep it short.**



Troubleshooting

Answers the important question: What do I do if something goes wrong? Troubleshooting is an essential part of an SOP. Often, people never read the instructions until something goes wrong and they need help. Anticipating common problems and providing good troubleshooting advice is a beneficial approach.

If the person performing the task cannot fix a problem, they must know how to get help. List all types of help resources, including manuals or reference sources. What should the user do in case of an emergency? List any emergency contacts and how to reach them.



Related Information

It's important to provide users access to any policies or guidelines they need to be familiar with or need to reference. If you are creating a digital SOP, including hyperlinks to related information is easy.

- **Links to related documents.** These can be links to related policies, processes, and FAQ documents
- **Links to standards.** If the SOP supports compliance or accreditation standards, it's useful to provide links to those standards or regulations. You can include them in your policy and procedure system or insert links to external websites.
- **Attachments, diagrams, and flowcharts.** Especially if the procedure is complex, it's good to give users a visual illustration of the SOP's flow.

Feedback Forms

Give users an easy way to provide feedback and share their successes.

We highly recommend including a feedback form in all SOPs. This empowers users, giving them a way to participate in business improvements. Feedback forms can include fields for improvement suggestions about the document or the procedure.



Common SOP Writing Mistakes and How to Avoid Them

There's a lot we can say here. For this guide, we'll focus on the most serious mistakes as well as the best practices that can make the difference between SOPs that don't get used and those that can take your operations to the next level.

The main takeaway: don't force your users to have to work or think too hard.

You've probably heard the term cognitive overload. This is the mental exhaustion that occurs when the demands placed on working memory exceed its capacity. This happens when your SOP is too complicated and too long. Believe it or not, some organizations are still using Roman numerals to number their steps. This is a perfect example of cognitive overload. (Hmmm ... does XI stand for 9 or 11?) Using letters (A, B, C...) to number steps is almost as bad!



Here are common SOP writing mistakes and how to avoid them.

#1: Long paragraphs and text blobs.

Many SOPs we see out in the wild resemble those long legal documents we never read but usually sign anyway.

Think about your users or even your reviewers. When they first open your SOP, you don't want to scare them off or stress them out. At first glance, you want them to be engaged. The way you structure the SOP as well as the overall page layout and design has a huge impact here.

At Comprose, we've adopted a different meaning for KISS: Keep It Super Scannable.

We are big believers in "chunking information." Present content in concise, easy-to-use chunks. If you follow this principle, you'll decrease search time and increase user performance. Chunking gives your content structure, which is a game changer for updating and enabling content repurposing.

We also recommend including visuals and videos. Most readers learn best and retain the information when text instructions are paired with images and media. In many cases, a picture really is worth 1000 words! Whenever practical, include examples, diagrams, and illustrations to help the reader understand how to perform

the task. If you have a multinational audience, visuals may be essential.

TIP: To improve accessibility and support employees who are visually impaired, make sure you add Alternate (Alt) Text to all images.

Videos are particularly useful in keeping the reader or user engaged. One of our clients struggled to motivate employees to read their IT security policies and procedures. So, they supplemented the narrative with a series of humorous videos. It worked! Their technical writing staff became heroes.

At Comprose we've adopted a different meaning for KISS:
Keep it Super Scannable.



#2: Writing Complicated Steps

If your step contains multiple sentences or chains a bunch of if clauses together, you'll lose your audience fast. We often see steps written like the one below:

1. *Results should be transferred ONLINE (OEM) to the LIS (Misys) whenever possible.*
2. *Manual entry off the printout (MEM) should be avoided unless necessary. If MEM entry is used, the WS listed below will always default to the primary analyzer. If the result is from the second analyzer (with 2 as part of its name), the tests must be modified to that method code.*
3. *Manual entry via TEST mode should never be done without a supervisor's approval.*

There are many things wrong here:

- Steps are written in passive voice (vs. active voice).
- "If" clauses are chained together.
- Steps are too long.
- Steps contain vague wording (whenever possible? unless necessary?).



#3: Pompous or confusing wording

Readers won't be impressed with unnecessary **big words and an inflated vocabulary; this will only confuse and weigh them down.** Writing for the SOP user means writing in an easily understood style and vocabulary. Write from the user's point of view. Try using the second person "you" when writing instructions. It helps users believe you're on their side. Think as they would think. Admit when something is difficult or when they may face a problem.

Do what marketing experts do. Marketing communication and advertising is audience centric. Marketers use visuals; their copy is

succinct and targeted. Those same principles apply here. Engage the user by writing sentences that imply a benefit or advantage to them. As you draft the text, continually ask what the readers need to know and how they want to see it presented.

Whenever possible, substitute direct and simple words or phrases for long or possibly pretentious words and wordy phrases. **NOTE:** *This is where an AI tool or grammar checker can be highly beneficial.*

Below are a few examples:

Instead of:	Try:
Ascertain	Find out
Procure	Buy
Terminate	Stop or End
Demonstrate	Show
Quantify	Measure
At this point in time	Now
In the event that	If or when
Due to the fact that	Because

Be specific. Do not make assumptions that users will know what you mean. Below is an example:

Stir the solution until thoroughly mixed. (*What does thoroughly mixed mean?*)

Tell the reader exactly what to do when you give instructions. Provide a verifiable outcome.



#4 Mixing SOPs and policy in the same document

Another common mistake is putting policy and procedure sections in the same document or mixing policy provisions with procedure steps.

This happens when authors don't understand the difference between policy and procedure.

Because this problem has such far-reaching consequences, we've devoted an entire blog post to it. [Difference Between Policy, Procedure, Work Instructions](#)



#5: Chaining several SOPs together in one document

A common mistake is to chain several procedures together in one document. Procedures that are too long and complex overwhelm the reader.

The best technique is to break actions up into manageable units. The 49 steps rule is a good "rule of thumb" to help you keep your procedures manageable. It is based on the principle of human memory. Seven items are the outer limit for most people to keep in memory at one time. 49 steps (7 steps with 7 substeps each) is pressing the upper limit of most people's short-term memory.

Beyond that, it becomes easier and easier for people to get confused, lose their place, and make mistakes. Count the number of actions in your critical path. If it approaches 49, you're in the danger zone. Consider breaking the complex procedure into separate smaller procedures or work instructions.

The best technique is to break actions up into manageable units.



I'm Finished Writing; What's Next?

Now It's Time to Test Your SOP

One of the most common mistakes people make when creating SOPs is neglecting to test them with actual users. Conducting usability testing is the quickest way to ensure that people will read and use the final product instead of leaving it to gather dust on the shelf or, even worse, cause errors and confusion.

If you feel there isn't enough time for usability testing, reviewing your approach to policy and procedure development may be worth reviewing. This will help you create an efficient way to capture subject matter expertise (SME) knowledge from the outset, which will allow you to modify the standard operating procedure (SOP) quickly and easily based on the results of the testing. Don't waste time and money on unusable documents. Make sure you get it right!

One of the most common mistakes people make when creating SOPs is neglecting to test them with actual users.

Give the SOP to someone who will use it. Watch to see if they can complete the task using just the SOP. After watching the list, check the following areas:

- Test for clarity. Do they understand it?
- Test the functionality. Have them use the SOP by following the steps exactly as they were written. Watch them to determine if they can complete the task correctly.
- Analyze the results.
 - Did you omit any steps?
 - Is any information unnecessary?
 - Do you need to add any visuals?
 - Did you include necessary warnings and precautions?
 - Did you list the desired result or response to the action, if applicable?
- Update the SOP as needed until someone can use the procedure and achieve the desired outcome with minimal supervision.



Review

After you've completed testing and fine-tuned the SOP, typically, you'll need to submit it to your review team and eventually to the final approvers. Because you've done your work, this step usually goes smoothly because the SOP is crystal clear and easy to follow.

Impact on Maintenance

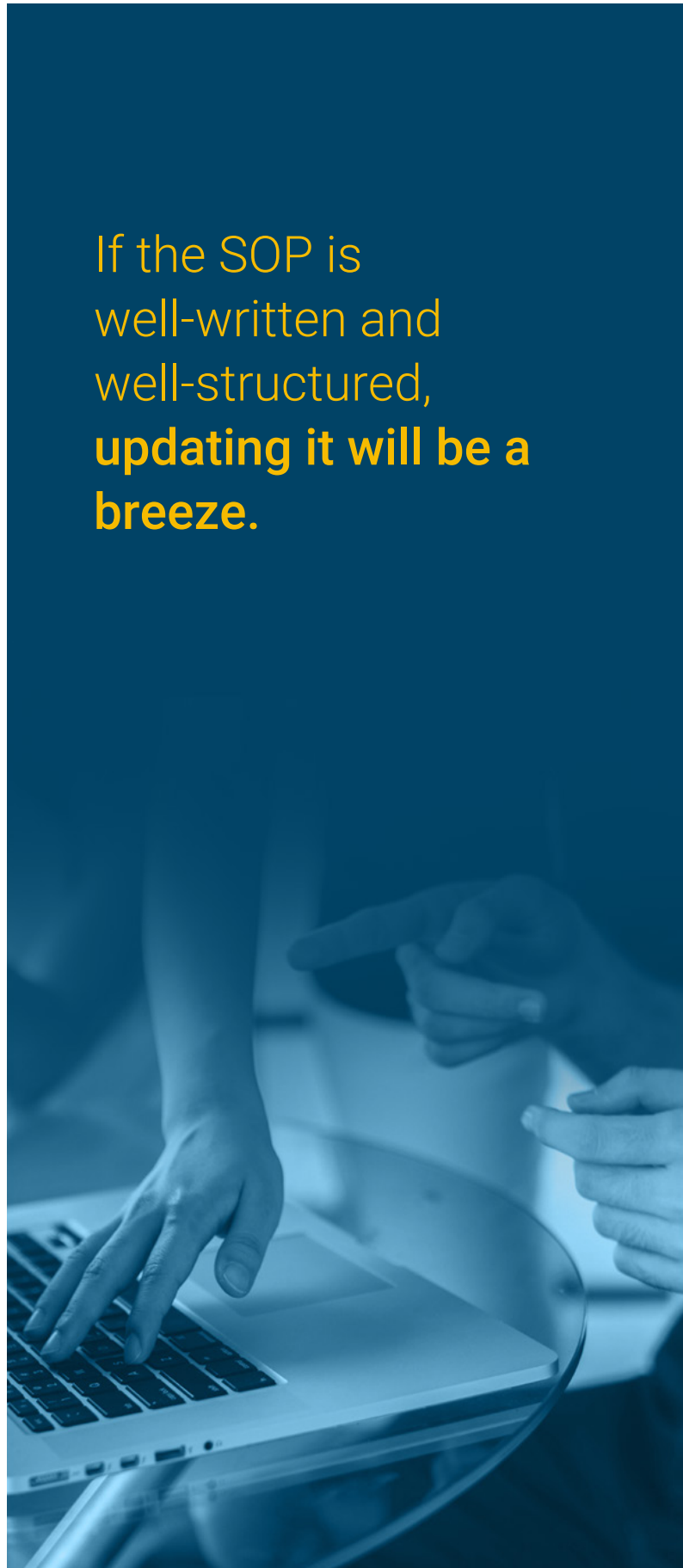
As you know, change is inevitable. You'll need to revise SOPs in response to operations or regulation changes. In our conversations with organizations, the complaints we hear the most are around updating.

In addition to empowering users and driving business improvements, another huge payoff for ensuring SOP content quality is maintenance.

If the SOP is well-written and well-structured, updating it will be a breeze.

If you haven't already, consider using a tool that automates periodic reviews, tracks changes, and manages revisions. This way, you can put these tasks on autopilot.

If the SOP is well-written and well-structured, updating it will be a breeze.



Tools & Resources for SOP Writing

When writing effective Standard Operating Procedures (SOPs), there are many solutions, ranging from simple SOP templates to full-featured, structured content systems. Our [Zavanta SaaS platform](#) and [Operations Mapping](#) method are among them.

Most fall into one of two categories: 1) conventional document products (unstructured content) or 2) structured policy and procedure systems. We recommend you [read our blog post about Structured Content](#) and why it is so essential for SOPs.

Unstructured, document solutions

A conventional document approach may be a viable option for small organizations and implementations, but the tools in this category have serious limitations for policy and SOP management at scale.

SOP Solutions Categories:

- 1) Unstructured content
- 2) Structured systems

Unstructured Content Examples

- **MS Word and document management.** Some people assume that utilizing an MS Word template or a document management system can ensure content quality and standardization. That's not the case. Authors can still do their own thing. Formatting is manual and time-consuming. We talk to people every day who have abandoned their word-processing document approach due to the high cost and impracticality of enforcement.
- **Boilerplate SOP documents.** Even though pre-written SOPs can provide a head start, it's crucial to remember that considerable time is still required to make these SOPs reflect your own operations. Ultimately, you end up with unstructured documents, which leads to the problems we mentioned above.
- **Simple SOP and checklist tools.** These tools provide SOP templates and some boiler-plated content, enabling a small organization to get started quickly. They aren't the best option for mid and large organizations implementing policy and procedures at scale or those who are regulated or undergo audits.



Learning Management Systems (LMS) are excellent for formal training and education, but they aren't designed for just-in-time lookup or for policy and procedure management. If you have oversight by auditors and regulators, an LMS alone isn't useful. A good solution is to repurpose your SOP content by linking it to your LMS.

Structured Content Policy & SOP Systems, like Zavanta, are designed for organizations needing a robust end-to-end solution to optimize people performance, enforce regulatory compliance, and manage risk. These systems represent a breakthrough over conventional document approaches, reducing the cost and burden across all life cycle phases, starting with SOP authoring. The necessary controls and standardization are baked in to ensure high-quality, usable SOPs. Because content can be repurposed without formatting, SOPs can be published to any device automatically.

A Cautionary Note About Using AI for SOP Writing

Advancements in AI are truly amazing and have the potential to improve many aspects of SOP management and communication.

One of the ways AI is helping companies – especially small businesses -- is by suggesting topics for their HR employee manuals and

policies, such as a Code of Conduct. AI can give you a jump start. **However, it's important to note that you'll be disappointed if you expect AI to generate a standard operating procedure (SOP) in seconds and think it's good enough.** Unfortunately, such a magic bullet doesn't exist yet!

Our recommendation for leveraging AI when determining how to write a standard operating procedure is similar to our advice for pre-written, off-the-shelf SOPs. While boilerplate material may provide topic ideas or industry-specific policy information, it doesn't reflect your company's operations or the best practices of your star performers. **AI-generated content is not as valuable at a tactical level unless you devote time to editing the content and filling in any gaps.**

At our company, we use AI and grammar-checking tools. Sometimes, AI gives us ideas for general topics and a head start for writing a policy or procedure. However, we have also seen negative results from AI-generated content. Some of the content it returns is simply incorrect. Considering how AI works (by searching the internet), it's easy to understand why some results are often incomplete or useless.



Zavanta Streamlines SOP Writing and More!

[Zavanta software](#) is a specialized SaaS system that helps teams communicate standard operating procedures (SOPs) with utmost clarity while reducing the cost and burden of all work tasks through automation. Zavanta's structured content model is a significant breakthrough over conventional document management.

With Zavanta's interviewing tool, Guided Authoring, anyone can create a usable, structured SOP.

Every employee has the same, repeatable SOP to follow when needed. Management has tools that enable accountability and ensure compliance with end-to-end task tracking. Costs go down, employee confidence goes up, and compliance is enforced.

[Contact us](#) to start a conversation.



About Comprose

We are dedicated to helping people thrive by gaining access to accurate, updated "how to" knowledge anytime, anyplace, in any language.

Everything we do – our method, our software, our advice – is focused on one thing: helping our clients achieve their strategic goals by getting procedural knowledge out of peoples' heads and shareable.

We're passionate about the power of good systems and clear standard operating procedures because of the tangible results we've seen our customers achieve: agility, reduced operating costs, faster training, predictability, greater transparency.

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