SOP Checklist

A step-by-step SOP checklist for writing, reviewing and rolling out standard operating procedures.

Define scope and purpose

- [ ] State the task or process the SOP covers in one sentence.
- [ ] Explain why the procedure exists and the outcome it delivers.
- [ ] Set the boundaries — what is included and what is out of scope.
- [ ] Identify the trigger that starts the procedure.
  For example a customer order, a schedule or a request.
- [ ] Note any procedures this one depends on or links to.
- [ ] Give the SOP a clear, searchable title and reference number.

Assign roles and responsibilities

- [ ] List every role involved in the procedure.
- [ ] Name who performs each step, not just who is accountable.
- [ ] Identify who approves decisions or exceptions.
- [ ] Define handoffs between people or teams.
- [ ] Specify the skills or training a role must have first.
- [ ] Record an owner responsible for keeping the SOP current.

Document the steps

- [ ] Break the task into a logical sequence of single actions.
- [ ] Write each step as a short imperative sentence.
- [ ] Number the steps and keep one action per line.
- [ ] Add decision points with the criteria for each branch.
- [ ] Call out common mistakes and how to avoid them.
- [ ] Add screenshots or diagrams where they make a step clearer.
- [ ] Define what a successful, completed task looks like.

List tools and inputs

- [ ] List the equipment, software and access each step needs.
- [ ] Record any templates, forms or files used.
- [ ] Note the materials or data required as inputs.
- [ ] Specify versions or settings where they affect the result.
- [ ] Identify where to find or request each tool or input.
- [ ] List the outputs the procedure produces and where they go.

Address safety and compliance

- [ ] Note any hazards and the precautions for each step.
- [ ] List required protective equipment or safe conditions.

- [ ] Reference the regulations, policies or standards that apply.
- [ ] Record data handling or privacy rules the task must follow.
- [ ] Add stop conditions for when the task must not continue.
- [ ] Explain how to report incidents or near misses.

Review and version control

- [ ] Have a subject matter expert check the draft for accuracy.
- [ ] Test the steps with someone new to the task.
- [ ] Revise anything that was unclear or out of order.
- [ ] Route the SOP to the approver for sign-off.
- [ ] Assign a version number, author and approval date.
  Increment the version on every change so old copies are obvious.
- [ ] Store the SOP in one central, controlled location.

Train and roll out

- [ ] Announce the new or updated SOP to everyone affected.
- [ ] Walk the team through the procedure step by step.
- [ ] Have each person complete the task under supervision once.
- [ ] Confirm understanding and answer questions.
- [ ] Retire or archive the procedure the SOP replaces.
- [ ] Set a review date and the owner who will manage it.