

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.