

Lightweight SOP Starter

Capture a repeatable task with an owner, trigger, steps, exception, and proof.

USE THIS WHEN

Use this for a task that another person may need to repeat. Start with one page and one real run. A useful SOP tells the operator when to begin, what to do, and how to know the work is complete.

THE METHOD

- 1

Choose one task
Name a single trigger and an accountable owner.
- 2

Write the normal path
List actions in execution order, with the system or location used.
- 3

Handle an exception
Say when to stop or escalate and to whom; do not hide judgment in a vague step.
- 4

Test and control
Have a second operator perform the task; capture gaps, approval, version, and next review date.

WORKED EXAMPLE

Task / trigger	Confirm new appointment when booking is accepted
Owner / normal path	Front desk checks details, sends confirmation, logs send time
Exception	Missing contact details: pause and ask booking owner
Proof	Confirmation record linked to appointment; review after test run

WHEN THE METHOD BREAKS

If the operator cannot tell what to do at a decision point, add a criterion or named escalation. Do not make an untested draft mandatory.

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Working sheet / Fill it during the task; keep the source record alongside it.

Name / date / work period

Task name / version / date

Trigger and accountable owner

Inputs, access, or tools required

Step 1 and expected output

Step 2 and expected output

Step 3 and expected output

Exception / stop and escalation path

Proof of completion / record location

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Closeout / Check the result, name the gap, and set the next action.

Who tested the draft and on what date?

Where did the operator hesitate or deviate?

What change is required and who approves it?

Approved version / next review date

COMPLETION CHECK

- ☐ Owner and trigger clear
- ☐ Exception tested
- ☐ Record location named

NEXT USE

Mark the first run as a test. Replace the draft only after the owner accepts the corrected steps.