# 8 Steps to Writing an SOP      By: Lab Manager Magazine - Published: February 23 2009

**You Need to Create an SOP...Now What?**  *The SOP development process is an excellent way for managers, workers, and technical advisers to cooperate for everyone's benefit. Standard operating procedures used in combination with planned training and regular performance feedback lead to an effective and motivated workforce.***The following eight steps describe a method that will produce excellent procedures and generate maximum buy-in from the workforce.**

## 1. Plan for Results

Standard operating procedures work best when they are designed to achieve specific results. Decide what business goals will be achieved through better management with SOPs and how those goals will be measured. Many benchmarks exist in the industry to help measure quality and efficiency in specific areas.

## 2. Produce First Draft

Select a format for the procedure. If you choose to use simple steps, hierarchical steps, or the graphic format, first make a detailed list of the steps in the order that they are done. A simple way to get started is to observe someone performing the process as it now exists and write down everything that the person does. This list is now a draft of the procedure. If the procedure needs to appear as a flowchart, start with the most reasonable beginning point. Draw the decisions that a worker will need to make and the actions that follow each decision. Don't try to be perfect with the first draft, because it is very likely that you will need to make many revisions.

## 3. Conduct Internal Review

Provide each worker who performs the procedure with a copy of the draft SOP. Ask the workers to review and suggest changes that will make the procedure easier to understand or more accurate or will improve performance. Assure the workers that their input is important and will be used. People are much more likely to accept and use an SOP if they feel a sense of ownership in it. Another reason to involve the workers is that they are likely to have good ideas. Highly successful managers actively engage their work teams in a continual quest to become more efficient, increase cost-effectiveness, and improve quality.

## 4. Conduct External Review

Managers increasingly rely on advisers outside their own organizations. The SOP writing process is an excellent way to tap the expertise of your advisers. Provide them with a copy of the SOP draft. Ask them to suggest any changes that will make it clearer and more effective. Revise the procedure as necessary to incorporate their input.

## 5. Test

For procedures to be effective, they must perform in the workplace. There is only one way to be absolutely certain that a procedure is well written and performs as expected. Have someone test the procedure by performing each step exactly as it is described while the procedure writer watches. Have a person not familiar with the work follow the procedure. Any steps that cause confusion or hesitation for the test worker should be revised.

## 6. Post

Make a final draft of the procedure and post it in the appropriate locations. The workplace is one essential location. A master SOP file should be kept in a central location so workers can review little-used SOPs when necessary. It is essential to keep SOPs up to date.

## 7. Train

One of the last steps in the SOP writing process is often the most neglected. Train or retrain everyone as necessary to follow the procedure exactly. Even with very detailed steps, it is necessary to train all workers. Otherwise, individuals will interpret the meaning of procedures in different ways, leading to inconsistency in work routines and performance.

An effective SOP training program first will make the worker aware of what training activities will take place and what the trainee will be able to do when training is complete. The trainer will explain and demonstrate both why and how each step in the SOP is performed and then give the learner a chance to practice. The trainer will provide positive feedback as the learner masters parts of the procedure and patiently revisits those parts that need improvement.

## 8. Audit

An audit will show whether the procedure is being adhered to and whether the objectives are being met. It can also help identify areas where improvements can be made. Each SOP should be audited about three months after implementation and thereafter at least annually. In addition, the SOP should be audited when dispensing errors or "near misses" occur, to identify ways of preventing their recurrence.