**Business SOP Template**

**SOP** Title

|  |  |
| --- | --- |
| SOP Number |  |
| Department |  |
| Effective Date |  |
| Review Date |  |
| Prepared By |  |
| Version |  |

Purpose

*Briefly describe why this SOP exists and the value it provides to the business.*

|  |
| --- |
| Description |

Scope

*Define where and to whom this SOP applies. List departments, roles, or business functions included, and note any exclusions.*

|  |
| --- |
| Description |

Process Overview Snapshot

*Provide a short summary of the process in plain language. Include the goal, the high-level steps, and who benefits from this SOP.*

|  |
| --- |
| Description |

Roles, Responsibilities, and Stakeholders

|  |  |  |
| --- | --- | --- |
| Role | Responsibility | Stakeholder Impacted |
|  |  |  |
|  |  |  |
|  |  |  |

Inputs and Outputs

|  |  |
| --- | --- |
| Inputs (triggers that start the process) | Outputs (deliverables or results) |
|  |  |
|  |  |
|  |  |

Procedure

|  |
| --- |
| 1. Step One
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. Step Two
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. Step Three
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. Step Four
 |
| * Instruction
* Instruction
* Instruction
 |

KPIs and Metrics

*List measurable indicators to assess the success of this SOP (e.g., response time, cost savings, error rate, customer satisfaction).*

|  |
| --- |
| Description |

Risks and Controls

*Document potential risks or bottlenecks, along with the controls or safeguards in place.*

|  |
| --- |
| Description |

Related SOPs / Linked Processes

*Cross-reference any other SOPs that interact with this one (e.g., “Sales SOP – Lead Management” or “Finance SOP – Invoicing”).*

|  |
| --- |
| Description |

Process Improvement Notes

*Capture lessons learned, improvement ideas, or feedback from staff using this SOP. Update during reviews.*

|  |
| --- |
| Description |

Documentation and Recordkeeping

*Specify what forms, logs, or reports are associated with this SOP, and where they should be stored.*

|  |
| --- |
| Description |

Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date | Description of Change | Author | Approver |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Signature | Date |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |