# **📑 Standard Operating Procedure (SOP) Template**

*A structured guide to document and standardize business processes for consistency and efficiency.*

## **📌 Why an SOP Matters**

✅ Ensures consistency in daily business operations.  
✅ Reduces errors and miscommunication.  
✅ Helps in training new employees quickly.  
✅ Improves efficiency and accountability.  
✅ Serves as a reference for troubleshooting and compliance.

## **📜 SOP Template Structure**

### 📌 1. SOP Title

Clearly state the process name (e.g., “Customer Onboarding Process”). Keep it simple, direct, and easily identifiable.

### 📌 2. Purpose & Scope

* Purpose: Explain why the SOP exists and what problem it solves.
* Scope: Define the departments or individuals responsible for following the SOP.

Example:  
 *"This SOP outlines the steps for onboarding new customers at [Company Name]. It ensures a seamless process, reducing churn and improving customer satisfaction. Applicable to the Customer Success and Sales teams."*

### 📌 3. Roles & Responsibilities

List the key roles involved in executing the process and define their responsibilities.

Example:

| **Role** | **Responsibilities** |
| --- | --- |
| Customer Support Rep | Collects customer details and verifies identity |
| Sales Team | Ensures the contract is signed and payment is processed |
| IT Team | Sets up customer access in the system |

### 📌 4. Required Resources & Tools

List the necessary tools, documents, or software needed to complete the process.

* CRM Software (e.g., Salesforce, HubSpot)
* Customer contract template
* Email automation tools
* Payment processing platform

### 📌 5. Step-by-Step Process

Break down the process into clear, numbered steps in chronological order.

#### Example SOP – Customer Onboarding Process

1️⃣ Receive New Customer Inquiry

* Sales team receives an inquiry via email or website.
* Record details in CRM.

2️⃣ Verify Customer Details

* Confirm business information and KYC compliance.
* Check for duplicate records.

3️⃣ Send Contract & Receive Payment

* Send the contract via e-signature platform.
* Upon signature, invoice the customer.

4️⃣ Account Setup & Handover

* IT team sets up customer access.
* Customer Success team initiates onboarding call.

5️⃣ Follow-up & Feedback Collection

* Send a follow-up email within 7 days.
* Request feedback to improve onboarding experience.

### 📌 6. Compliance & Quality Control

* Mention any regulations or policies to be followed (e.g., GDPR, data security).
* Define quality control checkpoints to ensure SOP adherence.

### 📌 7. Troubleshooting & Escalation

* Outline common issues and how to resolve them.
* Define an escalation process if issues require higher-level intervention.

### 📌 8. Review & Update Schedule

* Set a timeline for regular SOP reviews (e.g., every 6 months).
* Assign a responsible person for updates.

## **📌 Sample SOP: Order Processing for an E-commerce Store**

### SOP Title: Order Processing Workflow

### Purpose & Scope:

This SOP ensures a streamlined order fulfillment process for our e-commerce business, minimizing delays and improving customer satisfaction. Applicable to the Order Processing and Warehouse Teams.

### Roles & Responsibilities:

| **Role** | **Responsibilities** |
| --- | --- |
| Order Processing Team | Verifies and processes customer orders |
| Warehouse Team | Picks, packs, and ships orders |
| Customer Support | Handles order inquiries and tracking |

### **Required Tools & Resources:**

* E-commerce platform (e.g., Shopify, WooCommerce)
* Inventory management system
* Shipping carrier software

### **Step-by-Step Process:**

1️⃣ Receive & Verify Order

* Order Processing Team checks order details in the system.
* Verify payment confirmation and check for fraud alerts.

2️⃣ Update Inventory & Prepare Order

* Inventory system updates stock levels.
* Warehouse Team picks items from stock and prepares packaging.

3️⃣ Ship Order & Update Customer

* Generate shipping label and assign tracking number.
* Send confirmation email with tracking details.

4️⃣ Post-Delivery Follow-Up

* After delivery, send a feedback request email.
* Address customer complaints or refund requests if necessary.

### **Compliance & Quality Control:**

* Ensure all orders are processed within 24 hours of payment confirmation.
* Cross-check product quality before shipping.

### **Troubleshooting & Escalation:**

* If stock runs out, notify the customer with alternatives or refund options.
* If shipping delays occur, escalate to carrier support.

### **Review & Update Schedule:**

* SOP will be reviewed every 6 months for process improvements.

## **📌 Final Thoughts**

✅ A well-documented SOP improves efficiency and ensures consistency.  
✅ Helps businesses scale without operational chaos.  
✅ Ensures smooth employee transitions and training.