# [Company name]

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## Standard Operating Procedure - [PROCEDURE TITLE IN ACTIVE VOICE]

Document ID: SOP-XXX-001 · Version: 1.0 (Draft / Active) · Classification: Internal Operations · Organisation / team: **[Your Business or Department Name]** · Effective date: **[YYYY-MM-DD]** · Review cadence: Annual

## 1. Purpose & objectives

Why this procedure exists: **[State clearly why this procedure exists, what baseline quality standard it preserves, and the primary business problem it solves. Keep to 1–2 sentences.]**

*Example: To define the weekly process for reviewing billable hours, issuing client invoices, and reconciling bank payments by Friday afternoon, preventing delayed receivables.*

## 2. Scope & initiation trigger

• Scope: **[Specify which team, department, or software tools this procedure applies to. E.g. All active client accounts managed by Operations.]**

• Trigger event: **[What exact event triggers this routine? E.g. Weekly every Friday at 9:00 AM, or immediately upon signing a client contract.]**

## 3. Roles & accountabilities

Procedure owner **[Job Title / Name]**: Primary executor. Completes steps on schedule and ensures quality checks are satisfied.

Approver / manager **[Job Title / Name]**: Validates completed work, reviews discrepancies exceeding thresholds, and authorises sign-off.

Covering backup **[Job Title / Name]**: Designated secondary colleague trained to execute this procedure when the primary owner is absent.

## 4. Step-by-step procedure

| Step | Action (active verbs) | Expected result / verification check |
|---|---|---|
| Step 1 | **[Open accounting / task software and export weekly unbilled records.]** | **[Summary total matches timesheet records.]** |
| Step 2 | **[Review line items against active client contract rate cards.]** | **[No unapproved discounts or rate discrepancies.]** |
| Step 3 | **[Draft invoice records and attach approved expense receipts.]** | **[Draft batch set to ‘Pending Approval’ status.]** |
| Step 4 | **[Submit invoice batch to Reviewer / Manager for written approval.]** | **[Written sign-off received via email or Slack.]** |
| Step 5 | **[Dispatch finalized PDF invoices to clients and update AR ledger.]** | **[Invoices logged in 30-day tracking sheet.]** |

## 5. Exceptions & error recovery

• Missing information: If required data is unavailable, contact **[Primary Contact]** by **[Time]**. Do not proceed with unapproved assumptions.

• Threshold discrepancy: If an error or variance exceeds **[$XXX or XX%]**, pause execution and escalate immediately to **[Approver Title]**.

• System downtime: If primary software is unavailable, log tasks in the offline emergency tracker and resume upon restoration.

## 6. Governance & approval sign-off

Prepared by (owner): **[Name & Title]** · Approved by (manager): **[Name & Title]** · Approval date: **[YYYY-MM-DD]** · Next scheduled review: **[1 Year from Effective]**