**[Company name]**

*How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.*

# SOP Builder

*A step-by-step builder for writing a standard operating procedure your team can actually follow.*

## About this procedure

| SOP title | [Title of this SOP] |
|---|---|
| SOP number | [SOP number] |
| Department | [Department] |
| Owner | [Name and role] |
| Approver | [Name and role] |
| Effective date | [DD Month YYYY] |
| Review date | [DD Month YYYY] |

### 1. Purpose

Purpose: **[Write the purpose here in one or two sentences: what this procedure achieves, and why it matters.]**

### 2. Scope

Scope: **[Write the scope here: who and what this procedure covers, and what it does not cover.]**

### 3. Responsibilities

*Name every role that plays a part, and what each role is responsible for.*

| Role | Responsibility |
|---|---|
| | |
| | |

[Company name]

| Role | Responsibility |
|---|---|
| | |
| | |

## 4. Procedure

*Write each step in order. One action per step, with the person who does it and the record it leaves.*

| Step | Action | Done by | Record |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

## 5. Records

*List every record this procedure creates, where it is kept, and how long it is kept for.*

| Record | Where it is kept | Kept for |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

## 6. Review and approval

| | |
|---|---|
| **Approved by** | **[Name and role]** |
| **Approved on** | **[DD Month YYYY]** |
| **Next review** | **[DD Month YYYY]** |
| **Version** | **[Version number of this document]** |

*Change history*

| Version | Date | Change | Changed by |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

## Completion

| ✓ | Check | Notes |
|---|---|---|
| | The purpose and scope are agreed with the owner. | |
| | Every step names the person who does it. | |
| | Every record has a home and a retention time. | |
| | A review date is set and the approver has signed. | |

| | |
|---|---|
| **Document** | SOP Builder |
| **Version** | 1.0 |
| **Prepared by** | **[Name and role]** |
| **Owner** | **[Name and role]** |
| **Date** | **[DD Month YYYY]** |

# [Company name]

| | |
|---|---|
| | |
| **Review date** | **[DD Month YYYY]** |