7 Steps to Write Standard Operating Procedures that ACTUALLY Work

() I'm going to summarize six years of working with thousands of teams on their processes in just seven steps. Not only will you learn how to write a Standard Operating Procedure in 15 () minutes or less, which is crazy fast. You will also learn how to avoid the common mistakes that result in your Standard Operating Procedure not being used, not being followed, and ultimately not leading to your business becoming more consistent and more efficient. Step one to write your Standard Operating Procedures is to duplicate your Template. () That is always going to be your first step. So having an awesome Template will make your life a whole lot easier. In this case, I'm using a Google Doc, which I have structured as my Template, and I'm just going to go up here and click make a copy. You can steal the copy of my Template by going into the description of this video. But if you're using another tool for documenting your knowledge on your team, such as Notion, ClickUp, SmartSuite, Monday, Asana, whatever it might be, you can do the exact same thing there. Just create a Task or a Record for your Standard Operating Procedure, save it as a Template if you can, and duplicate it. So at this point, I'm going to go ahead and make a copy to complete step number one, and start off with step number two, which is to pick out what exactly () am I creating an SOP for? This is going to be the area of your business, and usually a how to is going to be the starting word. So for example, how to script a video, how to invoice a client, how to follow up with a prospect, how to process a testimonial, how to like and subscribe, different things like that that you might want to have good processes for. You want to create that as the title of your SOP in step two. And that brings us to mistake number one, which is creating SOPs for things that don't need SOPs. SOPS are just instructions. They're instructions that outline step by step how to do something. The way I like to think about them is to view them almost like printed out MapQuest instructions. You remember those days? You have to go somewhere, you print out the MapQuest instructions of the turn by turn directions? Maybe. I think I just lost all of Gen Z there. If you do remember those, that is what our SOPs are like. They're these pre-printed instructions for a specific path to a specific destination. Just like with MapQuest instructions, you don't need to print out directions to every possible house you could go visit, right? No, you just need to print out the MapQuest instructions for the places you go often or the place you're going today. In the same way, when we're writing our Standard Operating Procedures, we want to pick topics that are immediately going to be helpful to us, that we know, oh, if I had this, I would check it. Because, shocker, if you create Standard Operating Procedures or instructions that actually are helpful to people, who would have thunk it? People will actually use them, which helps this whole thing go smoothly. If you'd like me to make a follow-up video where I go through how to pick which areas of your business to create SOPs for first, you can just write the word 'donut'. Donut, because I'm hungry for a donut. Write the word donut in the comments below, and that will act as a vote to let me know you'd like to see a follow-up video about picking out your SOPs. I also love the idea that people might come to this video in the future, and they just see a bunch of comments of people yelling, Donuts. That'd be fun. () For step three, we want to decide who is going to be responsible for our SOP. We've got two roles to fill. We've got the subject matter expert or the brain involved, and we've got the author or owner. The subject matter expert is the person or persons who are going to influence the strategy of whatever it is you're doing. How are you going to accomplish that? The owner is the person who's actually going to be taking pen to paper or hands to keyboard or whatever it might be and writing out the procedure. This person is ideally also the person who's going to be doing this process for the long haul. If you're doing something for the very first time and you don't have that subject matter expert in house, you might find yourself filling this gap by reading books, hiring a consultant, watching YouTube videos, or yes, even using ChatGPT. However you accomplish this, you are going to need a little bit of expertise to record how things are done. But in most cases, people are writing SOPs for something they are already doing. So this isn't that big of a challenge. Whoever you choose to be the owner of the SOP will be in charge of not only filling it out, but also maintaining it over time. If you're using a task management tool, you might write down that owner inside your task management tool using the Assignee Field. But if you're inside a Google Doc like I am, you could write something like SOP Owner, and then just tag the person you want to have as the owner. What matters here is not the specific technology or software or feature you're using. It just matters that you're very clear on who is responsible. And before you ask, yes, it is absolutely okay if you have new hires or people who are just joining the team assigned as the SOP owner. In fact, having new hires create SOP during their first 90 days is a really great way to onboard them very quickly. And I have a whole video dedicated to that up at the top. All right, so for the next three steps of this process, there's actually two paths you can go down. I want to give you both options so you can make the choice that's right for you. And I'll share which is my favorite as well. Option number one is to take your hands, use a keyword, and write out the steps I'm about to tell you. As long as you can type at least 100 words a minute, this will probably take you about 15 minutes to go ahead and create. The second way to go about this, if you are not fast at typing or you just hate typing for whatever reason, you can go in and record a video. Common ways to do this would be to use a Loom or Google Meet. Record a video of you doing the activity, whatever it is your SOP is about. From there, get the transcript of that call. Both of these tools, both Loom and Google Meet, give you that transcript. Use that transcript and feed it to ChatGPT. Tell ChatGPT to format it as an SOP. Once it gives you its output, you're going to need to tweak it a little bit because AI, and then you should be done. This process will take you about eight minutes, plus however long it takes you to actually do the work. So I would estimate this will take about 25 minutes to get an SOP done. Either way you go, we ultimately want our final SOP to be written because that will make it a lot easier to update. We don't want to have your SOPs just as videos or in some proprietary software that you have to pay a subscription for. That's just a lot of wasted resources and time and limits your access and just so many other things. We want to get this into a written form. So whichever format you find best for you to get there, go for it. I'm going to be going through the faster method in the rest of this video because despite what those obsessed with AI might think, writing this has actually been faster in all of my tests. But either way you want to go about this, you can follow the rest of this video. Just modify it for your preferred step. But with that, let's get into the next step. We're going to capture the start, stop, and key steps involved in this process. () We're going to do this all in one quick sitting. It'll probably take about five minutes, maybe 10, if you're really stretching it here. So I'm going to change the topic of my SOP to how to process feedback from customers. So in my procedure section now, I need to write down the start, stop, and key steps of this process. So first question, when does this process kick off? What starts it? Well, it starts with reading customer feedback, right? That's the very first thing. We couldn't process feedback without actually receiving it. So we read that customer feedback. This right here is our start. Then we want to scroll all the way down to the bottom and identify our stop. What is the last point we want to include in this given SOP? If this was a MapQuest instruction, this would be our destination. So what is the last step? Since I know all of our feedback is in tasks, I know my very last step is going to be closing the customer feedback task. So that's the last thing we're going to do. And once we have the start and the stop, we're ready to start filling in the steps. How do we get from point A to point B? What are those MapQuest instructions? For me, my steps look something like, carefully read the customer feedback, summarize it into bullet points, log any ideas, log any testimonials, and then close the customer feedback task. I deleted the extra steps because I don't need them. These are the key steps that I go through to get from point A to point B. One tip I'll share when it comes to writing out these step names is to make sure that you make your steps "mini results". They're the outcome of a given activity. That way, even if someone's just skimming through the list, they know that this is the outcome I need to move to step two to step three to step four. So make each step an outcome. That brings me to one of the mistakes that I see around SOP creation, () which is making SOPs too big. When it comes to big topics like how to get leads or how to create a video, or how to develop a product, you're going to end up having an SOP with 35 plus steps just required to explain all of the big picture things that go in to creating that big goal. Having an SOP this large isn't just a difficult to maintain, plain and unwieldy to read, it's not very effective. It's like if you were to have a cross country road trip, and rather than bringing a map, which shows you all the options, you print out a 35 page document of MapQuest instructions, turning by turn by turn by turn. Not only is that MapQuest print out going to waste a lot of ink and paper, it'll also force you into just going on one specific path. If anything comes up along the way, oh, shoot, you have to throw out your instructions because you ran into a detour. Very rarely in small businesses do we want to be this rigid with things this big in the business. In fact, my suggestions to clients is to generally keep SOPs to be less than eight steps. If you go a little bit over, that's fine. If you go under, that's great. But generally, eight steps is a good indicator that your SOP is short, bite size, and tactical. What we want to then do is when we have those big processes in our business, like how to make a video, rather than creating that 35-page SOP or that long document outlining everything in MapQuest, we want to create a collection of smaller SOPs that we can slice and dice, mix and match. So we might have one SOP for how to film a video, one SOP for how to script a video, one SOP for how to edit a video, one SOP for how to publish a video. When we create our SOPs to be modular and bite size like this, we can mix and match. We can change the order of things. We can say, oh, well, rather than publishing the YouTube video, this video is going to be only for our email subscribers. So over here, we're going to have an SOP just for that special exception. And rather than going here, we're going to have you go up here and do this step next. So in this way, we're making our SOPs infinitely combinable without having to create tons of different SOPs that are massively huge just for small deviations in the process. Now, I probably shouldn't mix metaphors, but I'm going to in case this doesn't click for you. You can also think about it like a recipe book. When you have a recipe book, and each SOP is like a recipe, you don't have one recipe called how to have a three-course dinner, right? It's not like everything's all together. No, it's all a la carte. It's all a recipe for salad, a recipe for soup, a recipe for bread, and then you can mix and match. SOPS, we want to do the same thing. There's no reason to make a 38-page or 20-page or anything more than eight steps as an SOP. Just don't bother. Keep it modular, and then you'll find that you can reuse those same pieces of an SOP in multiple areas of your business, saving you time, headache, and confusion along the way. Now we're ready for step five, where we're going to fill in the purpose, inputs, and outputs. This should take you about five minutes to do. () So when filled in, the purpose section might look something like this. Then we scroll down to inputs and outputs. Inputs are the resources we need in order to complete the given SOP. So for our process, our inputs look something like this, and they mostly revolve around software access. But in your process, your ingredients might be a little different. They might require a book being read, or a file being printed, or a response being received. Anything you need in order to start this process, you want to define here in the inputs area. Down here at the bottom, then we want to outline what is our output. How do we know we have done this thing perfectly? In as simple words if possible. In this case, our outputs might look something like this. Our goal here is to define what success looks like, both in terms of measurable things that we can actually see and those not so measurable things as well. Anything that you view as the definition of success for this process, put it under this outputs area. Once you have the purpose, inputs, and outputs filled in, which should just take a few minutes, you're ready to move on to the next step. By the way, if you want to steal my SOP Template, you can actually find the link to this one in the description below, as well as some bonus resources around getting started with SOP. So all that in one free little bundle found below this video if you'd like. () Once we got into this point, we are ready for step six, which is where we fill in the details and FAQs of the SOP, which is this section right here that I'm highlighting in blue and the FAQ section at the bottom. Now, You might be thinking, oh my gosh, that's a lot. But I want you to set your mind to viewing this as something that needs to be done in about five minutes. If you had only five minutes to give instructions for each of these steps, what would you write? What would you link to? What would you show images of? What would you do? That is the amount of self-restrain I want you to have going into this SOP, because if you spend a lot longer than that, I guarantee you you're going to be wasting time, because we can always add more details later. If someone's really stuck on how to close a Task, we can always add more instructions. But if you spend an hour or two hours or three hours, God forbid, on an SOP, we will never get that time back. Trust me, you are better off having the SOP owner add little bits that are missing over time rather than you taking an enormous amount of time today to create more and more details for these hypothetical realities where you need to have more and more details. For example, here is what my initial notes might be on the first draft of this SOP. It took me about two minutes to do, maybe less. Once you have these details filled out, you can scroll down to the very bottom and add any FAQs. So if there's anything that you didn't have space or reason to mention above, you can link to that here. You can see an example FAQ right here, but normally your very first draft, this FAQ section will be either blank or very, very short. You'll add to this FAQ section over time. Once this SOP is all written, we're ready for step number seven, () which is use and improve. Basically, the next time we have a Task due, in this case, the next time we have feedback come in, we're going to use the SOP at the time of doing the Task, and we're going to look at them side by side. What am I doing? What does the SOP say? Is there anything different? If there is anything that the user of the SOP notices is off, we're going to encourage them to make an edit, make a comment, change the SOP to match reality. And yes, that does mean we want to give people access to comment at the very least, but preferably, fully edit these SOPs, because SOPs are a tool for the person doing the work. They should have access to change how this is done. For example, if I go back to this SOP here, you'll notice the outcome I have is summarize this feedback into bullet points. When this SOP was first created, I bet that the instructions and the details of this probably said, go through, read it, leave things in the notepad, blah, blah, blah, write it all out. But I want my team members, and you probably want yours, to be able to innovate on this step if they want to. So you might change the step inside here to say, rather than reading it and summarizing it, it might be, use ChatGPT to summarize this in a fraction of the amount of time. That kind of innovation within in a process is something that the people doing the work are going to do way better than a senior manager or a CEO. And so we want to give them permission and encouragement to do that. And in the rare event that someone might get over eager and change your process too much, as long as you're using something online to track your SOPs, such as ClickUp, Asana, Monday, SmartSuite, a Google Doc, you have built in version history. So you can always go back in and revise previous versions of that document to undo any changes if anyone did get over excited. But considering most people struggle to get their team to even use SOPs, if you've got the problem of people being over excited, there are worse problems to have. But at the end of the day, SOPs are just one tool in your toolbox when it comes to systemizing your business. If you'd like to discover what the rest of the toolbox might have in it, check this video on the end screen where I go through my ultimate guide for systemizing your business. And remember to Enjoy the Process!