

# Supporting Documentation Best Practices - SOP's & Checklists

*Why is creating SOP's and Checklists so hard?*

**Challenge #1** - Not having clearly defined goals

**Solution** - Define why you are creating the documentation

Examples -

Get information out of our heads  
Identify bottlenecks that we can't see  
Explain the steps on how a process is completed

*Getting clear and specific can help keep you from getting too detailed.*

**Challenge #2** - Not having a streamlined process to capture information

**Solution** - Use SOP & Checklists that have a standardized format

*Here is a link to some that I created [Supporting Documentation Templates](#)*

**Challenge #3**- Confusion over skills training and job training

**Solution** - Keeps you from going down the rabbit hole

Job Training = What do I do?  
Skills Training = How do I do it?

*You may see the need to develop Job Training SOP's and Skills Training SOP's but by clearly identifying the difference between the two it will help keep you from getting too detailed.*

**Review** - Ask yourself the following questions

Does what I captured align with my goals?

Did I capture how we want the process to happen?

*If the answers is no, go back and fill in what's missing.*

**Challenge #4** - Where do I store all of these?

**Solution** - Check out these digital platforms that help you create, store and assign your documents.

[Trainual](#)

[Playbook Builder](#)

[Whale](#)