

## HOW TO CREATE SOPs

### 1. Define your objective for creating an SOP

- Why create this document?
- Set up meeting with your team to finalize your SOP objective
- How?

Use SMART to find out objective

- S - Specific goals (5 “W” questions)
  - Who: who is involved in this goal?
  - What: What do I want to accomplish?
  - Where: Where is this goal to achieve?
  - When: When do I want to achieve this goal?
  - Why: Why do I want to achieve this goal?
- M – Measurement goals
  - How many/ much?
  - How do I know if I have reached my goal?
  - What is my indicator of progress?
- A – Achievable goals
  - ✓ Defined well enough that you can actually achieve it
  - Do I have resources & capabilities to achieve the goal? If not, what am I missing?
  - Have others done it successfully before?
- R – Realistic
  - ✓ Can the goal be realistically achieved by given the available resources & time
  - Is the goal realistic & within reach?
  - Is the goal reachable, given the time & resources?
  - Are you able to commit to achieve the goal?
- T – Timely goals
  - ✓ It has start & finish date
  - Does my goal have deadline?
  - By when do you want to achieve your goal?



### 2. Determine the stakeholders & creators

- Assemble your team (involves all personnel who engaging in/ affected by SOP in document development process)



### 3. Define the end-user

- Who will be using the SOP?
- Many people may help create an SOP
- Focused on actual duties of end-user



### 4. Determine the scope of SOP

- First, think who will use this SOP (as discuss above)
- Second, identify what equipment/ materials needed
- Third, consider any other factors that may affect the task/ process described in SOP



## 5. Determine the format of SOP

- Categories of SOP format
  - Step-by-step written list
  - Hierarchical list
  - Flowchart
  - Simple checklist
  - Video
  - Interactive course



## 6. Gather all info

- Before writing SOP, gather necessary info which includes:
  - i. Research the task/ process
    - Look at process/ task
    - Include industry guidelines, best practices, relevant policies/ procedures
  - ii. Consult subject matter experts
    - Interview expert individual (eg: supervisor)
    - This individual may provide valuable info that help in create more comprehensive & accurate SOP
  - iii. Review existing policies & procedures
  - iv. Observe task/ process
    - Get better understanding of steps involved



## 7. Outline Sop document (begin writing)

- What to include?
  - i. Title page
    - Document's unique ID number
    - Date of creation/ editing document
    - Department/ professional title of the entity who will implement the SOP
    - Names & titles of individuals who created document
  - ii. Preparatory information
    - ✓ Preliminary info:
      - SOP purpose
      - Roles & responsibilities
      - Resources & materials
      - Cautions, warnings & other-hazard-related info
  - iii. Methodology & procedures
    - Use chosen format
    - Write in detailed
  - iv. Quality control & assurance
  - v. References & glossary

### Note:

- Avoid jargon/ complex language
- Use bullet points/ numbered lists
- Use active voice instead of passive voice