[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. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

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]

Created with The Office File (theofficefile.com) • Standard Operating Procedure Master Template • Free for workplace customization