YOUR WORKING TOOL

Standard Operating Procedure Template

1 Start conditions and ordered work

Document one repeatable job. Add or remove rows to match the real work; keep the exception and completion page with the steps.

Procedure _____ Business or client _____ Version _____

Purpose result and boundaries

What should this procedure achieve? State the start and finish, and any important exclusion.

Your answer

Trigger and required inputs

What starts the task? What must be available or verified before work begins?

Your answer

People tools and records

Who follows this? Which current tools, permissions and records do they need?

Your answer

Step	Role	Action and tool	Check and next step
1			
2			
3			
4			
5			

YOUR WORKING TOOL

Procedure Checks and Exceptions

2 Handle exceptions and confirm completion

Procedure _____ Version _____

Exceptions and decision paths

Say what stops, what may continue, who decides and what permits the work to resume.

Exception or decision	What to do now	Who decides and how work resumes

Completion checklist

Check essential results before marking the work complete. These are checks, not a second copy of every step.

☐ Completion check _____

☐ Completion check _____

☐ Completion check _____

☐ Completion check _____

☐ Completion check _____

Completion record

Where is completion recorded and what reference shows the result?

Your answer

Maintain the current procedure

Owner _____ Version _____ Issued _____ Review _____

Current location _____ Review trigger _____

Test one normal case and one exception with the person who will use it. Record the correction, owner and next version.

Correction or next test _____

Current explanation and related tools: navigateadvisorygroup.com/articles/standard-operating-procedure

Standard operating procedures and task checklists are established operating practices. This adaptable structure, explanation and fictional example are original Navigate material.