remotee.

The SOP Outline Template

Turn tribal knowledge into
a repeatable workflow

Most Businesses Run on Tribal Knowledge

THE PROBLEM

The only person who knows how to do the task is the person doing it. If they leave, get sick, or go on holiday, the work stops. The knowledge was in their head, not in a system.

Weeks

of productivity lost when key people are unavailable

THE ROOT CAUSE

Most SOPs are too complex. They try to cover every edge case, every exception, every possible scenario. The result is a 20-page document that no one reads.

You need documentation, but it must be simple enough to actually use.

This guide gives you a simple SOP outline that captures the essentials without the bloat. Fits on 1-2 pages.

The 7-Part SOP Framework

1. Purpose

What is this SOP for? Who uses it? When is it used?

2. Inputs

What do you need before you start? (e.g., forms, access, approvals)

3. Steps

What are the steps to complete this workflow? (action, tool, time, notes)

4. Outputs

What should be delivered at the end? (deliverables, records, notifications)

5. Quality Checkpoints

How do you know the work is done correctly? (validation criteria)

6. Exceptions

What happens if something goes wrong? (escalation paths)

7. Versioning

What changed in this version? (date, changes, updated by)

This framework fits on 1-2 pages. If it is longer, break it into multiple SOPs.

Write an SOP in 20 Minutes

8-STEP PROCESS

1 Choose one repeatable workflow (e.g., client onboarding, invoice processing)

2 Fill in the Purpose section (what, who, when)

3 List the Inputs (what you need before you start)

4 Document the Steps (use the table format, keep it simple)

5 List the Outputs (what should be delivered)

6 Add Quality Checkpoints (how you know it is done correctly)

7 Document Exceptions (what happens if something goes wrong)

8 Save and share (make it accessible to the team)

COMMON MISTAKES TO AVOID

Making SOPs too long (20+ pages)

Keep it to 1-2 pages. If it is longer, break it into multiple SOPs.

Writing SOPs for undefined workflows

Only document workflows that are repeatable and stable. If the process changes every time, it is not ready for an SOP.

Not updating SOPs when workflows change

Review SOPs every 3 months. Update them when workflows change.

Writing SOPs that no one uses

Make SOPs accessible (shared drive, wiki, project management tool). Train the team on where to find them.

remotee.

Ready to Turn Tribal Knowledge into Systems?

Unlock the Full Playbook

Get the complete SOP Pack Playbook with SOP library structure, training workflows, and continuous improvement loops.

Unlock the playbooks library →

Book a Strategy Call

I will review your specific workflows, identify your top 3 documentation priorities, and show you exactly how I would build your SOP library.

Book your 30-minute call →

About Remotee

I help Australian businesses turn tribal knowledge into repeatable systems. I do not just place people. I build the systems, train the team, and give you ongoing support.

remotee.com.au