

PLAYBOOK

The SOP Pack Playbook

Convert a messy workflow into documented execution in 90 minutes

Most SOPs Are Written Once and Never Used

THE PROBLEM

They sit in a folder somewhere. No one reads them. No one updates them. They become shelf-ware.

The problem is not that people do not want to follow processes. The problem is that most SOPs are written for compliance, not execution.

WHY IT HAPPENS

Most business owners do not have an SOP writing structure. They do not know what to include, what to leave out, or how to make it actionable.

So they write a 10-page document that no one reads, or a 3-bullet checklist that misses all the edge cases.

The solution is not to write more SOPs. It is to write better SOPs. SOPs that people actually use.

The 7-Section SOP Template

1. Purpose (1-2 sentences)

Why does this task exist? What problem does it solve?

3. Inputs (Bullet list)

What information, files, or access does the person need before they start?

5. Outputs (Bullet list)

What does "done" look like? What should exist after this task is complete?

7. Exceptions and Escalations (Bullet list)

What should the person do if something goes wrong? Who do they ask?

2. Trigger (1 sentence)

What event starts this task? Use "When X happens, do Y" format.

4. Steps (Numbered list)

The exact sequence of actions. One step per line. Use action verbs.

6. Quality Checks (Bullet list)

What should the person check before they mark the task complete?

Exception Handling Rules

1

Define the "Happy Path" First

Write the SOP for the 80% case. The standard, no-surprises scenario. Do not try to cover every edge case in the main steps.

2

Add an "Exceptions" Section

List the 3-5 most common exceptions. For each one, write what it looks like, what to do, and who to ask.

3

Add an Escalation Trigger

Define when the person should stop and ask for help. Use clear criteria like dollar thresholds or client impact.

4

Review Exceptions Quarterly

If the same exception happens 3+ times, add it to the main steps. If it happens once, leave it in exceptions.

Versioning and Ownership

VERSIONING RULES

Version 1.0

Initial SOP (first draft)

Version 1.1

Minor updates (typo fixes, clarifications)

Version 2.0

Major updates (new steps, new tools, new exceptions)

OWNERSHIP RULES

Every SOP needs an owner

- Keeping the SOP up to date
- Reviewing it quarterly
- Adding new exceptions as they come up
- Training new people on the SOP

Your 90-Minute Implementation Plan

NEXT STEPS

- 1 Pick one repeatable workflow to document this week
- 2 Write the 7-section SOP using the template
- 3 Record a Loom walkthrough showing how to do the task
- 4 Test the SOP with someone and update based on what you see

TIME BREAKDOWN

Total: 90 minutes

Step 1: Pick workflow (10 min)

Step 2: Write SOP (45 min)

Step 3: Record Loom (15 min)

Step 4: Test with someone (20 min)

Common Mistakes to Avoid

WHAT NOT TO DO

Writing SOPs for Compliance, Not Execution

Do not write SOPs to tick a box. Write them to make delegation easier.

Writing 10-Page SOPs

If your SOP is longer than 2 pages, it is too long. Break it into multiple SOPs or simplify the process.

Skipping the Loom Walkthrough

Text-only SOPs are hard to follow. Record a 10-minute video. It saves hours of training time.

Not Defining "Done"

If the person does not know what "done" looks like, they will either over-deliver or under-deliver. Add clear outputs.

Not Handling Exceptions

If your SOP only covers the happy path, it will break the first time something goes wrong. Add an exceptions section.

Not Assigning an Owner

If no one owns the SOP, it will never get updated. Assign an owner and a review cadence.

Ready to Build Your SOP Library?

Download the SOP Pack Templates

Get the complete 7-section SOP template, Loom script, and SOP library structure.

[Download templates →](#)

Book a Strategy Call

I will review your workflows, identify your top 5 SOPs to write, and show you how to build an SOP library that people actually use.

[Check to see if you qualify →](#)

ABOUT REMOTEE

I help Australian businesses reclaim their time by building compliance-ready delegation systems. I do not just place people. I build the systems, train the team, and give you ongoing support.

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