The Human Layer

The SOP template

One procedure for one piece of work you repeat, so it comes out the same whoever does it: a tool, you, or someone you hire. Read this page, then fill in pages 2 and 3.

The six parts

What starts it
The one event that begins the work, like a signed agreement or a booked call.

The steps
One action per step, in order, with when it is due and the tool it happens in.

Done when
What someone can see when the work is finished.

Who is accountable
One person who keeps the procedure true. If you work alone, that is you.

Who does each step
A tool, you, or a team member. Tick Needs a decision when a person has to make a call at that step.

Last checked
The date someone walked through it and confirmed it still matches the work.

> **What does Needs a decision mean?** A person has to make a call at that step. It commits your business to a price, a date, a change in scope or an exception, or a client would notice if a person skipped it. Tick the box, and give the step to you or a team member, never to a tool.

An example: new client onboarding

Step	When it is due	Done in	Tool	You	Team member	Needs a decision
1. Send the welcome email	Same day	Gmail	■			
2. Send the first invoice	Same day	QuickBooks	■			
3. Confirm start date and package	Within 1 day	Agreement		■		■
4. Send the kickoff booking link	Within 2 days	Calendly			■	
5. Share the folder and intake form	Within 2 days	Google Drive			■	
6. Read the intake	Day before kickoff	Intake form		■		■

Starts when the client signs the agreement. Done when the client has the invoice, the kickoff call and the folder, and you have read the intake. Steps 3 and 6 need a decision, so they stay with you. If you work alone, the team member steps are yours until you hire. The tools and timings are examples.

How to fill it in

1. **Pick one workflow** you repeat every week.
2. **Write the steps from the last time it went wrong,** one action each, with when it is due and the tool it happens in.
3. **Mark who does each step,** and tick Needs a decision wherever a person has to make a call.
4. **Test it on someone new,** or run it yourself from the page, fix every place you stop, and date the Last checked line.

The SOP template

Workflow: _____ **Last checked:** _____

Starts when: _____ **Accountable:** _____

Step	When it is due	Done in	Tool	You	Team member	Needs a decision
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐

Needs a decision: tick it when a person has to make a call at that step, such as a price, a date, a change in scope or an exception. Those steps go to you or a team member, never to a tool.

More steps on page 3

The SOP template, continued

Step	When it is due	Done in	Tool	You	Team member	Needs a decision
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐

Done when:

Tool: a system does it and a person checks it. You or Team member: a person does it. Needs a decision: a person has to make a call at that step, so it never goes to a tool. Check the whole procedure each quarter, and the day the process changes.

Want your procedures built into the tools you use? On a North Star Operations Clarity Call we look at where your business loses clients and hours.

Book a Clarity Call at khudco.com/operations

Scan to book