IT Glue

A **Kaseya** COMPANY

SOP Documentation: A Guide for Writing SOPs

A standard operating procedure (SOP) document gives you a detailed, in-depth workflow required to perform a specific task. Since SOP provides granular details on completing a task, it requires much more effort than providing a high-level overview of a process. You need to provide detailed steps on what must be followed to deliver a specific outcome.

IT Glue is the world's leading IT documentation solution, and based on our experiences working with over 13,000 companies, we've compiled this guide to give you a list of best practices for writing SOPs correctly to enhance efficiency and maximize your productivity.

10
best practices for writing SOPs

SOPs play a critical role in the success of a business since they provide detailed instructions on completing tasks and processes. They reduce complexity, make processes more efficient and lower business costs. For these reasons, you must focus on how to draft them effectively. Here's a list of best practices that can help you implement SOPs the right way.

1

# Straightforward and to the point

Your SOP should be clear and concise, and should be written in an easily understandable manner. Since multiple people are likely to use the documentation you create, write it in a conversational tone. Reading the text aloud once you've written it can help you understand whether it is conversational.

Here's an example:

Instead of saying: Once you have identified the issues in the system, reach out to the IT administrator.

Say this: Found the issues? Contact IT admin.

This type of documentation makes it easy for anyone to follow. Also, use jargon judiciously and only when required. Use only words that are common knowledge in your team.

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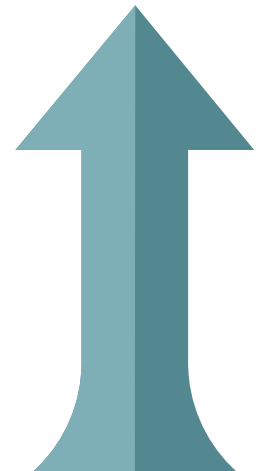
2

Templatize

One of the significant causes of inefficiency is inconsistent documentation. When there is no standard format for your SOP, everyone will likely use their own formats leading to confusion and time waste. Whenever there are similar procedures in various processes, you need to templatize your documentation to make it consistent across the organization.

You can create your own templates or get existing templates from a documentation solution and customize them to your requirements. Here is a list of benefits when you templatize your SOPs:

- Easy to document and use

- Decrease in errors caused by inconsistent content

- Reduction in the accidental omission of critical information

- Consistency and uniformity across all documents

- Lower time and money wasted

- Higher flexibility in documentation processes

3

Incorporate visuals

Most people are visual learners. Having plenty of visual aids can be an effective way to illustrate the complex information you wish to convey to your users. Research shows that users learn better and retain information longer when they learn through visuals.

You can use the following types of visuals in your SOPs:

- **Diagrams:** You can use a variety of diagrams and images to convey ideas that are difficult to express with words. Appealing diagrams can eliminate boredom when learning new things.

- **Flowcharts:** A flowchart provides you with a visual representation of a workflow. It also shows a clear hierarchy of your procedural steps and who is responsible for carrying them out.

- **Videos:** Well-created videos can provide the best explainer for all learners. For instance, you can use a how-to video to illustrate a step-by-step procedure and eliminate potential confusion from using words.

In addition to these, you may also use a range of other multimedia, such as screenshots, graphs and tables, to make information easier to digest.

4

Link to related documents

Documentation is all about improving efficiency in your processes. You can enhance efficiency only by bringing all the related information together so that all the information you need is readily available at your fingertips.

For instance, if you have a process that pertains to a specific location or server, you must link to it to ensure instant access to the location or server information. Instant access to related information makes information search a breeze.

To make the most out of your SOPs, you need to review your existing documentation and identify all the items that can be linked together. Once you make it a practice to link your documentation, adding new documents as you create them will be easy.
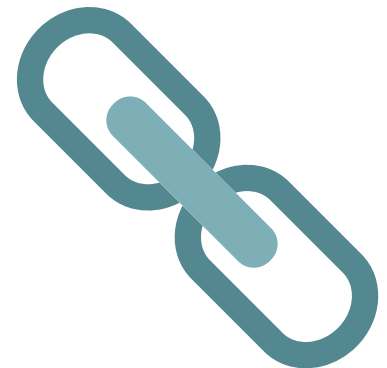
5 Review, revise and update

Procedures change more often than you think, and it is important to keep them updated. In many organizations, outdated documentation is a serious concern. When you fail to review your SOP documentation, your procedures may evolve, but your documentation will remain outdated. As a result, users cannot get accurate information from their documentation.

Regularly reviewing your SOP documentation will be useful during the revision process since you can easily identify what is missing and what needs to be updated. As a result, your SOPs will get more efficient and accurate.

Here's how you keep your SOPs updated:

- Create a plan on what you must document in your environment

- Establish a schedule for reviewing your SOPs

- Keep your documentation simple enough to make instant changes and edits

- Ensure easy sharing of the updated documentation with your team members

- Incorporate controls on who can make edits to your critical documents

- Track the changes made and keep a version history of all the modifications

6

Prioritize and segment

All procedures are not the same. You need to prioritize their documentation and segment them based on their importance. When you are starting, you don't have to create documentation for all your procedures at once. Instead, focus on a single department or process applied to the entire organization.

Having one large document for all your documentation is not a good idea. It may create confusion when multiple people access, review and edit this document to make updates. When you have individual documents for different processes, you can easily avoid confusion by clearly defining the required information.
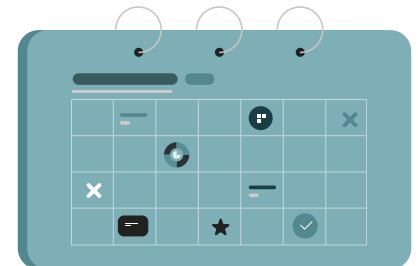
7

Involve stakeholders

Stakeholder engagement plays a vital role in the successful implementation of your SOPs. As a part of your SOP documentation, you must identify your stakeholder interest and manage any conflicts that may arise during the implementation. To ensure seamless operations, you must involve all the people associated with the procedures.

You can involve stakeholders through the following steps:

- **Identify internal and external stakeholders:** Internal stakeholders may include employees, managers and executives. External stakeholders may include clients, suppliers, sponsors, third-party vendors and users. Make sure you identify them all before documenting your SOPs.

- **Set expectations:** In your documentation, define what your stakeholders can expect from the SOP. Since your stakeholders may have their input, it is essential to manage their expectations before the SOP gets implemented.

- **Get feedback:** Getting feedback is vital for improving your SOPs. The feedback you obtain from various stages may provide insights into the limitations and issues in your documentation. You can fix the issues with these inputs to ensure proper SOP implementation.

- **Create new documentation:** Your documentation needs to be updated based on the changes made to the procedures. Take the time to update these changes and keep your documentation accurate.
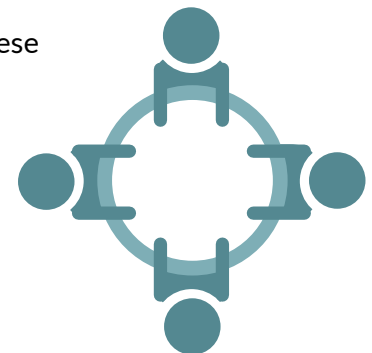
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Storage and accessibility

Your SOPs cannot be of much help to you if they are difficult to access. Storing your files locally on hard drives and computers will make sharing them with the stakeholders extremely difficult. You need a centralized storage repository that your stakeholders can access from anywhere.

A cloud-based documentation solution will come in handy during such requirements. Centralized access also allows your team to make changes to your SOP documents whenever required. Also, to prevent unauthorized access to your critical documents, you need a solution prioritizing security over all other things.

9

Security and backup

Data has become the backbone of any organization in today's digital world. You must ramp up your security measures by incorporating the right documentation solutions to prevent your data from falling into the wrong hands.

It would be best to have a solution with enterprise-grade security features, such as multifactor authentication (MFA), access control, host-proof hosting, audit trails and single sign-on. In addition to ensuring security against outside threats, you must incorporate access control measures to provide access only to the right people in your organization.

Even with all the high-end security features, something unfortunate might happen to your documentation. This is where backup comes in. A backup of your SOP documentation will help you easily restore your operations when something inevitably goes wrong.

10

Utilize documentation tools

Considering the complexity of today's IT environments, organizations cannot document their SOPs manually. You need a cloud-based tool that automates documentation and simplifies document sharing.

With a robust documentation tool, you don't have to worry about backup, security, accessibility, related items, etc. Moreover, you can instantly review your documents whenever you want and make the necessary revisions to keep your SOP documentation up to date.

Most importantly, you need a tool that seamlessly integrates with other tools in your IT environment and captures information automatically. With the right tool, you can make your SOP documentation completely proactive.
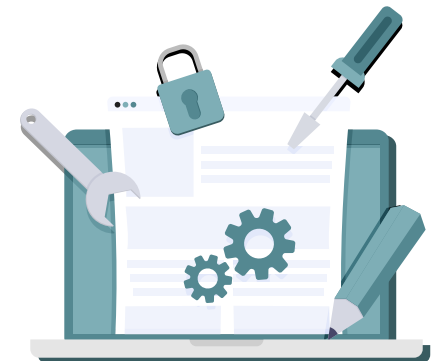
Secure, Mature and Integrated Documentation

Make documentation easy

Create and store KB, checklists and SOP articles effortlessly, embed rich network diagrams or import Word documents so your team is empowered to train and help themselves.

Secure your critical information

Sleep better with next-level password management featuring access control, host-proof hosting, at-risk password report and audit trail.

See the complete picture

Link related items together, so that all the information you need is at your fingertips. Rapidly define and understand relationships between various elements of your documentation.

Build a documentation culture

Edit and collaborate directly within the platform. Automatically save and sync to ensure your documents are always up to date for all team members.

Trusted by More than 13,000 Partners in 70+ Countries

Safeguard Your IT Operations With Secure Documentation

Request a Demo

When it comes to data security, **IT Glue** is second to none. We have achieved a SOC 2 Type-2 attestation, a set of data security and service controls that can only be maintained through ongoing, company-wide commitment.

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