PLANNING TEMPLATE

SOP Planning Template

A fill-in planning structure for a clear standard operating procedure.

Use this resource to plan clearly, identify gaps and decide the next practical action.

How to use it
Work through each item honestly. Mark complete, needs improvement or not applicable. Prioritize the items that affect trust, customer action, quality or business control.

Document title

Name the process using a clear verb and object.

Document owner

Person responsible for keeping the SOP accurate.

Approver

Person authorized to approve the procedure.

Purpose

Why the SOP exists and the outcome it protects.

Scope

Where the procedure applies and any exclusions.

Trigger

The event or request that starts the process.

End point

How the user knows the process is complete.

Roles

Who performs, reviews, approves or receives the output.

Inputs

Information, tools, forms, materials and access required.

Definitions

Terms or abbreviations the user must understand.

Procedure planning

Use one row per action. Start each step with a verb. Add the control or evidence at the point where it is required.

Step	Responsible role	Action / decision	Control / record
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Quality and acceptance criteria

Define the limits, checks or evidence that confirm acceptable completion.

Exceptions and escalation

State what to do when information is missing, a result is out of range or approval is needed.

Records and retention

List records created, storage location, retention period and access requirements.

Training and competency

Identify knowledge, authorization or training needed before performing the process.

Revision control

Record version, effective date, change summary and next review date.

Validation notes

Record who tested the draft, the example used and changes made after the walk-through.