64 SOP Examples

Each of the 16 templates starts on its own page, ready to copy, and ends with three published SOPs to compare it with. Some templates are adapted from a public procedure, and the rest are our response to a documented failure.

The story and sources behind each one, a blank general template, and how to write your own: trailhq.com/blog/sop-template

#	If you need to	Use	Format
1	Pause a team before a step it can't undo	Surgical Safety Checklist	Checklist
2	Run a production incident	Incident Response Runbook	Runbook
3	Teach a hands-on job	Work Instruction	Work instruction
4	Keep food inside a temperature limit	Food Safety Procedure	Step-by-step
5	Run a critical routine against the clock	Cockpit Checklist	Checklist
6	Ship a release to production	Deployment Runbook	Runbook
7	Close the books each month	Month-End Close Checklist	Checklist
8	Hand work to the next shift	Shift Handover	Handoff
9	Onboard or offboard an employee	Onboarding and Offboarding Checklist	Checklist
10	Document a lab method	Technical Procedure	Step-by-step
11	Triage support tickets	Ticket Triage Table	Decision table
12	Approve vendor payments	Vendor Payment Controls	Decision table
13	Back up and restore a database	Backup and Restore Runbook	Runbook
14	Count inventory	Cycle Count Procedure	Step-by-step
15	Approve a supplier	Supplier Approval Table	Decision table
16	Decide in advance what to do in an emergency	If-Then Flight Rules	If-then rules

1. Healthcare SOP Template: Surgical Safety Checklist

Checklist · Adapted from the WHO Surgical Safety Checklist

Use this format when experts already know the procedure by heart, but still need to pause at specific points to check that nothing critical has been missed.

Checklist: <procedure>

Read aloud by: <role>

Pause 1 · Before <the first step you can't undo>

- ☐ <Identity or target> confirmed against <source of truth>
- ☐ <Known risk> checked, and the plan for it said out loud
- ☐ <Equipment or input> ready and tested

Pause 2 · Before <the point of no return>

- ☐ Everyone states their name and role
- ☐ <Target> confirmed again by the person doing the work
- ☐ <Time-sensitive step> done within <limit>

Pause 3 · Before <handoff or leaving>

- ☐ <Counts or reconciliation> complete
- ☐ <Labels and records> correct
- ☐ Concerns for the next person stated

Stop rule: Work doesn't continue until every box at the pause is checked.

Real SOPs to compare

- The Joint Commission's Universal Protocol: the three steps accredited hospitals follow before a procedure, ending with a time-out.
- WHO's Safe Childbirth Checklist: the same checklist idea applied to childbirth, with a 2015 guide to putting it into practice.
- Stanford Medicine's Emergency Manual: free checklists for 25 critical events in the operating room.

Story and sources: trailhq.com/blog/sop-template

2. IT SOP Template: Incident Response Runbook

Runbook · Adapted from Google's SRE book and PagerDuty's incident response guide

Use this when something breaks in prod and multiple people need to work together to fix it.

Runbook: Incident response for <service>

Owner: <on-call lead>

Declare an incident if any of these is true

- Another team is needed to fix it
- Customers can see it
- It's still unsolved after 1 hour of focused debugging

Severity	Definition, with numbers like % of users affected
SEV-1	<...>
SEV-2	<...>
SEV-3	<...>

Unsure? Pick the higher one.

1. Page the incident commander (IC). The IC names a scribe and an ops lead.
2. Open <channel> and the incident doc. Top of the doc: impact, status, next update.
3. Only the ops lead changes production. Everyone else proposes; the IC decides.
4. Work in this order: stop the damage, restore service, keep the evidence. Recent deploy? Roll it back first.
5. Post an update every <30> minutes, even if nothing changed.
6. Handing over? Brief the next IC and wait for "I have command."
7. Close it: announce the end and schedule the postmortem.

Real SOPs to compare

- Atlassian's incident management handbook: how Atlassian detects, responds to, and learns from incidents, and what its incident manager does.
- GitLab's incident management process: the incident lead, responder, and communications lead roles, plus S1 to S4 severity levels.
- The UK Ministry of Justice's incident process: a short Cloud Platform runbook that goes from declaring an incident to the review afterward.

Story and sources: trailhq.com/blog/sop-template

3. Manufacturing SOP Template: Work Instruction

Work instruction · Adapted from the TWI job breakdown sheet

Use this when a new person needs to do a hands-on job the way your best person does it.

Work instruction: <task>

Station: <...> · **Version:** <n>

Parts, tools and materials: <...>

#	Important step (what)	Key points (how)	Reasons (why)
1	<Verb> <object>	<make-or-break detail>	<what goes wrong otherwise>
2	<Verb> <object>	<safety point>	<injury it prevents>
3	<Verb> <object>	<knack that makes it easier>	<time or effort it saves>

To teach it: Prepare the learner, show one step at a time, watch them do it while they explain the key points, then check back on their work later.

Real SOPs to compare

- UC Berkeley's engine lathe job safety analysis: each lathe task listed with its hazards and the controls for each one.
- UC Santa Barbara's metal lathe procedure: checklists for before, during, and after using the lathe, plus the protective gear.
- Prusa's MK4S kit assembly manual: the official eight-chapter guide to building Prusa's 3D printer kit.

Story and sources: trailhq.com/blog/sop-template

4. Restaurant SOP Template: Food Safety Procedure

Step-by-step · Adapted from the Institute of Child Nutrition's cooling SOP

Use this format when a task has a measurable desired limit and the SOP needs to explain what to do when a value falls outside that limit.

SOP: <task>

Implemented: <date> by <name> · **Reviewed:** <date> · **Revised:** <date>

Purpose: Prevent <hazard>.

Scope: <who does this, and where>.

Instructions

1. <Step>
2. <Step with a limit: "from X to Y within Z">

Monitoring: <what to measure, with which tool, how often>.

Corrective action

- Missed but recoverable (<condition>): <fix>, then measure again.
- Missed and not recoverable (<condition>): <discard, stop or quarantine>.
- Anyone who skipped the SOP is retrained.

Verification and records: <log name>. <Role> reviews and initials it every <period>. On days the task isn't done, the log says so. Keep records for <N> months.

Sample SOPs to compare

- Northern Nevada Public Health's sample cooling SOP: two cooling deadlines (70°F by hour 2, 41°F by hour 6), the reheat to 165°F, and logs kept for six months.
- The Virginia Department of Health's sample cooling policy: names the pans, the ice bath, and how often to check, and has the kitchen manager review the logs daily.
- Marin County's cooling SOP form: a fill-in form where a kitchen lists its foods, cooling methods, staff, checks, and fixes.

Story and sources: trailhq.com/blog/sop-template

5. Aviation SOP Template: Cockpit Checklist

Checklist · Our response to two documented accidents

Use this for time-sensitive critical procedures. For example, when one person needs to read each checklist item aloud and the other confirms it.

Checklist: <phase>

Method: challenge and response

Used when: <situation> · **Time available:** <seconds or minutes>

Reader: <role> · **Responder:** <role, who looks before answering>

Challenge	Response
<Item 1>	"<state>, checked"
<Item 2>	"<value>"
<Killer item> (the one that ends the day if missed)	"<state>"

Out: If <condition>, stop here and switch to <shorter checklist or procedure>.

Real SOPs to compare

- The University of Oklahoma's Cessna 152 checklist: the aviation school's normal and emergency checklists, with one item and one action per line.
- The University of Dubuque's Cessna 172 SOP: a flight school SOP with a table of what the pilots call out, and when.
- The 303rd Bomb Group's B-17 checklist: the cockpit checklist from the Army Air Forces' 1944 training manual, read aloud by the copilot.

Story and sources: trailhq.com/blog/sop-template

6. Software SOP Template: Deployment Runbook

Runbook · Our response to the Knight Capital failure

Use this on projects where the cost of a bad release outweighs the time spent checking it.

Runbook: Production deploy of <service>

Field	What to write
Covers	Code, config, and flag changes to <service>. A flag flip is a deploy.
Release	`<commit SHA>`, built once by CI as `<image digest>`. Diff: <link>
People	<name> deploys. <name>, who didn't write the change, checks.
Window	<weekdays, 10:00 to 15:00>. Not during <a freeze, an incident, or peak traffic>.
Rollback	`<exact command>` redeploys `<previous SHA>`. Takes <N> minutes.
Kill switch	`<exact command>` takes <service> offline. Either person can run it without asking.

Preflight

- ☐ CI is green on <SHA>, and staging has run this exact artifact for <24 hours>.
- ☐ The second person has read the diff and this runbook.
- ☐ Flags: any flag this release adds has a new name. No retired flag or config key is reused.
- ☐ Compatibility: the previous release works with everything this one changes (schema, config, message formats, flags). If it doesn't, split the release.
- ☐ Rollback rehearsed in staging: deploy, roll back, deploy again.
- ☐ Alerts for <service> page <on-call rotation>. Nothing that matters goes only to a mailbox.

Rollout

Stage	Scope	Bake	Go on only if
1	<1 host, or 1% of traffic>	<15 min and 100 requests>	The version check passes. <Error rate> and <p99 latency> on new hosts are within <X%> of old hosts.
2	<25%>	<30 min>	Same checks.
3	<100%>	<60 min>	Same checks, and <business metric> is steady.

Version check, after every stage

Run `<command that prints the build on every host>`. Pass means <n> of <n> hosts report <SHA> and none report anything else. The second person reads the output, not the tool's "success" message.

Stop

If	Then
A host reports a different build	Stop. Keep traffic off that host. Fix it or roll back the stage.
A check fails, or something shows up that you can't explain in <5> minutes	Roll back now. Debug later, on the previous release.
Rollback doesn't restore <metric> in <N> minutes	Use the kill switch. Declare an incident: <link to the incident runbook>.

After

- ☐ Post <SHA>, start and end times, and anything odd in <channel>.
- ☐ Open a ticket to delete this release's flags and old code paths by <date>.

Real SOPs to compare

- GitLab's deployment process: canary first, a 30-minute bake before promotion, a weekend change lock, and rules on who can roll back.
- Wikimedia's train deploys: a weekly release that reaches every wiki in three groups over three days, with a clear rule for when to roll back.
- GOV.UK's deployment process: integration, then staging, then production, with smoke tests gating each step and set hours for deploying.

Story and sources: trailhq.com/blog/sop-template

7. Accounting SOP Template: Month-End Close Checklist

Checklist · Adapted from the close rules in GitLab's handbook

Use this for tasks due on the same working days each month.

Month-end close: <entity>, <period>

Owner: <controller>

WD1 is the first business day after month-end. Similarly, WD-1 is the last business day before month-end.

WD	Task	Done when	Preparer	Reviewer
-1	Collect accrual support for expenses over <$5K>	<...>	<...>	<...>
1	Close AP and AR subledgers. Cutoff rule: <...>	<...>	<...>	<...>
2	Reconcile bank and cash accounts	<...>	<...>	<...>
3	Post accruals, prepaids, and payroll entries	<...>	<...>	<...>
4	Reconcile every balance sheet account	<...>	<...>	<...>
5	Flux review: explain changes over <10% or $X>	<...>	<...>	<...>
6	Controller signs off. Lock the period.	<...>	<...>	<...>

Rules

- The reviewer is never the preparer.
- Every account has a risk rating. High-risk accounts get a second reviewer.
- A reconciliation ties the ledger to something the preparer didn't produce: a bank statement, a vendor invoice, a report the reviewer pulls.
- Manual journal entries over <$X> need support attached and a reviewer.
- Accruals reverse next month and get compared with the invoices that arrive.
- The next period doesn't open until every reconciliation is signed.

Real SOPs to compare

- Western Carolina University's month-end close checklist: the June 2026 close, with every task sorted by the working day it's due.
- Rutgers' FY27 closing calendar: the controller's deadlines for each month, from the AP ledger close on day 3 to the controller's close on day 12.
- The University of Missouri System's month-end procedure: a control list that each person initials, signed off by an independent reviewer.

Story and sources: trailhq.com/blog/sop-template

8. Operations SOP Template: Shift Handover

Handoff · Our response to the Texas City refinery findings

Use this when one team picks up where another left off. This can happen on a factory floor, during an on-call rotation, or in a support team working across time zones.

Handover: <unit, queue, or system>

From: <name> · **To:** <name> · **When:** <date, time>

Face to face or on a call, with the log open. Both people sign.

1. **Right now:** what's unstable, urgent, or outside normal limits
2. **What changed:** work done this shift, in order, naming each system touched
3. **In progress:** jobs half done, open permits or tickets, who's waiting on what
4. **Next actions:** what the next shift has to do, and by when
5. **If it goes wrong:** what to watch for, and what to do first
6. **Read-back:** the receiver repeats the plan in their own words and asks questions

Rules

- The outgoing person writes the log before the conversation, in full sentences.
- No shorthand the next shift could read two ways. Name the equipment.
- The outgoing person stays until the receiver says "I have it."
- Leaving early or arriving late? Do the handover by phone, then log it.

Real SOPs to compare

- NSW Health's clinical handover policy: mandatory across NSW Health, with a named leader, face-to-face handover where possible, and a clear point when responsibility passes.
- DOE's guide to operations turnover: log reviews, joint walkdowns, and an off-going operator who stays until the relief signs. Appendix A has a sample checklist.
- GitLab's on-call handover: a handover issue for every shift, assigned to the incoming engineer, with a required end-of-shift summary.

Story and sources: trailhq.com/blog/sop-template

9. HR SOP Template: Onboarding and Offboarding Checklist

Checklist · Adapted from GitLab's onboarding flow

Use this for both onboarding, offboarding, or any other similar activities.

Onboarding: <name>, <role>

Opened by: <people ops>, <N> days before start

Built from: base list + <country> + <department> + <role> files

Each task ends as "Done" or "Checked, doesn't apply to me."

Before day 1 (manager, IT)

- ☐ Accounts for <role> requested from the access baseline
- ☐ Laptop shipped, buddy assigned

Day 1 (new hire)

- ☐ Signed in to every system on the access list
- ☐ Test ticket opened with IT, and closed

Weeks 1 to 4 (new hire, buddy)

- ☐ <Required training> finished and <policies> signed
- ☐ <First real task> done with the buddy

Day 15: People ops reviews open tasks. **Due:** start date + <31> days.

Offboarding: <name>

Owner: <IT or security> · **Due:** last working day

- ☐ SSO and email disabled
- ☐ Cloud users, API keys and personal access tokens removed in <AWS, GCP, ...>
- ☐ Secrets they could read rotated
- ☐ Admin roles in third-party tools removed
- ☐ One week later: sign-in logs checked for any access since

Real SOPs to compare

- PostHog's onboarding process: what the People team, the onboarding buddy, and the team lead each do, from before day one to the end of probation.
- Login.gov's offboarding checklist: every system to remove a departing engineer from, with a shorter list for people who are leaving only for a while.
- Cornell's exit procedures: an exit checklist split between the supervisor, HR, and the employee, from keys and cards to closed accounts.

Story and sources: trailhq.com/blog/sop-template

10. Laboratory SOP Template: Technical Procedure

Step-by-step · Adapted from EPA's guidance for technical SOPs

Use this for processes where multiple people need to follow the same steps and get the same result.

SOP <ID>: <method>

Rev: <n> · **Date:** <date> · **Page:** <x> of <y>

Prepared by: <name, date> · **Approved by:** <name, date>

1. Scope and applicability
2. Summary of method
3. Definitions
4. Health and safety warnings
5. Cautions (what can damage equipment or samples)
6. Interferences (what can throw off the result)
7. Personnel qualifications
8. Equipment and supplies
9. Procedure (numbered steps, active voice, present tense)
10. Data and records management
11. Quality control (<blanks, duplicates, acceptance limits>)
12. References

Real SOPs to compare

- EPA Region 4's field pH procedure: calibration with buffers that bracket the sample, acceptance limits, and a check at the end of the day.
- NIST's SOP 7 for weighing by single substitution: a calibration lab procedure with prerequisites, equations, control charts, and an uncertainty budget.
- CDC's lab procedure for serum cotinine: the method used for the NHANES survey, down to the QC rules for rejecting a run.

Story and sources: trailhq.com/blog/sop-template

11. Customer Support SOP Template: Ticket Triage Table

Decision table · Adapted from GitLab's support impact levels

Use this for teams where tickets pile up and you need a way to decide which ones to handle first.

Triage table: <product> support

Owner: <support lead>

Level	Impact and example	First reply	Then
1 Urgent	Down or unusable for everyone. Example: <all users get 502s>	30 min	Page on-call
2 High	Key feature broken, no workaround. Example: <CI builds failing>	4 h	Update every <4 h>
3 Normal	Key feature degraded, workaround exists. Example: <known bug>	8 h	Update daily
4 Low	Question or request, no impact. Example: <how do I enable X?>	24 h	Normal queue

Not an emergency: <some users affected>, <one page slow>, <one key failing>.

About to miss a reply target? Send a short reply with the time of your next update.

Escalate to <lead> when: <reply target missed by 1 h>, <customer very unhappy>.

Real SOPs to compare

- PostHog's customer support process: engineers answer the tickets, sorted by plan first, with response targets from 72 hours down to 8.
- Boston University IT's priority matrix: impact and urgency set the priority, and each priority has its own assignment and resolution targets.
- Mozilla's bug triage process for Firefox: every component has a triage owner, new bugs are triaged within a week, and S1 bugs are assigned within two business days.

Story and sources: trailhq.com/blog/sop-template

12. Finance SOP Template: Vendor Payment Controls

Decision table · Our response to business email compromise

Use it for requests that change who you pay, how much you pay, or where you send money.

Payment controls: Accounts payable

Owner: <finance lead>

Request	Verify by	Approvals
New vendor	Contact details from the signed contract	2
New bank details	Call the number on file, never one in the request	2
Urgent payment asked for by an exec	Call them on a number you already have	2
Known vendor, same details, PO match	Match invoice, PO and receipt	1

Rule: Verify on a channel the requester didn't choose.

After a change: <hold N days or send a small test payment>. Log who verified, how and when.

Paid a fraudster? Call your bank right away to request a recall, then report it at ic3.gov.

Real SOPs to compare

- The University of Wisconsin System's procedure for bank detail changes: which ways of checking a change count, which don't, and what to write down.
- The Wyoming State Auditor's banking verification form: staff record the call-back number and where it came from, which can't be the person asking for the change.
- UNC's rules for updating vendor bank accounts: call the vendor's accounting team on an independently sourced number, and never take new bank details by email.

Story and sources: trailhq.com/blog/sop-template

13. IT SOP Template: Backup and Restore Runbook

Runbook · Our response to GitLab's 2017 database outage

Use this for outage responses.

Runbook: Backup and restore for <database>

Owner: <name>, responsible for data durability

Last restore drill: <date>

Backups

1. <Tool and version> runs every <interval>. Its version matches the server's.
2. Success means a file of at least <size> in <bucket>, not just exit code 0.
3. Failures page <rotation>. Test the alert each quarter by breaking a backup on purpose.

Restore drill (every <month>)

4. Restore the latest backup to a fresh machine.
5. Compare row counts and the newest record's timestamp with production.
6. Record how long the restore took and how much data it would have lost.
7. Any check fails? Open an incident, not a ticket.

Before any destructive command: Run `hostname` and read the answer out loud.

Real SOPs to compare

- GitLab's WAL-G backup runbook: how GitLab.com backs up Postgres now, with automated restore tests that page someone if they stop.
- Wikimedia's MariaDB backups: snapshots four days a week, weekly logical dumps, how long each is kept, and how to recover from each.
- GOV.UK's RDS restore playbook: restoring a database from a snapshot and switching the app over to it, step by step, including as a drill.

Story and sources: trailhq.com/blog/sop-template

14. Warehouse SOP Template: Cycle Count Procedure

Step-by-step · Adapted from the GAO's guide to physical counts

Use this to check whether the stock on your shelves matches what your system says. The example is a warehouse, but it should work for any stockroom.

Cycle count: <warehouse>

Owner: <inventory control lead>

Schedule: A items every <month>, B every <quarter>, C every <year>. Every item gets counted at least once a year.

Counters: where possible, people who don't pick, receive, or put away in that area.

1. Print today's count list: item, description, location. No quantities.
2. Freeze the location, or note the last transaction time before you count.
3. Count and record. Open any box that isn't factory sealed.
4. A second person enters the counts and compares them with the system.
5. Variance over <tolerance>? A different counter recounts within 24 hours.
6. Still off? Research before adjusting: recent receipts, picks, moves, unit of measure.
7. Adjust the record with a reason code. Adjustments over <$X> need <manager> approval.
8. Report weekly: accuracy rate = accurate counts / items counted. Goal: <95% or more>.

Real SOPs to compare

- Fermilab's cycle count procedure: daily counts picked by ABC class instead of a yearly inventory, with recounts and a supervisor's sign-off.
- North Carolina's cycle counting guide: how state agencies set ABC classes and count frequencies, enter counts, and approve or order recounts.
- Colorado's cycle counting policy: state warehouses count at least once a fiscal year, freeze stock during the count, and get reconciliations approved.

Story and sources: trailhq.com/blog/sop-template

15. Supply Chain SOP Template: Supplier Approval Table

Decision table · Our response to the Senate's counterfeit parts findings

Use this to decide which suppliers you can buy from, and how much checking each kind of supplier needs first.

Supplier approval: <category>

Owner: <procurement lead>

Buyers order only from the approved supplier list. Additions follow this table.

Source	Before the first order	On every receipt
Original manufacturer	Contract and quality agreement	Paperwork and lot codes
Authorized distributor	Confirm with the maker that it's authorized	Paperwork and lot codes
Independent distributor	Audit, plus records tracing parts to the maker	Test a sample from every lot
Can't trace to the maker	Don't buy. Escalate to <role>	n/a

Rules

- A sample that passes approves that lot only, never the next one.
- Suspect parts are quarantined and reported to <quality, the customer, industry database>. They don't go back to the seller.
- Brokers count as independent distributors.
- Review each supplier's tier every <12 months>, and right after a failed test.

Real SOPs to compare

- EPA's procedure for avoiding counterfeit IT products: buy from manufacturers and authorized resellers, use other sellers only as a last resort, and quarantine suspects instead of sending them back.
- Ultra Maritime's counterfeit parts prevention plan: a defense supplier's buying rules by source, including customer approval before using a broker.
- DLA's Qualified Suppliers List program: how the Defense Logistics Agency qualifies manufacturers and distributors, with renewal every three years.

Story and sources: trailhq.com/blog/sop-template

16. Mission Control SOP Template: If-Then Flight Rules

If-then rules · *Adapted from NASA's Apollo flight mission rules*

Use this for rare, high-stakes moments when there won't be time to work out the answer. The example is a software team, but it should work for any emergency you can plan for.

Flight rules: <system>

Owner: <team> · **Last rehearsed:** <date>

Field	What to write	Example
Rule	<section>-<n>: <short name>	2-04: Error spike after a deploy
Condition	<what you observe, with a number>	5xx rate above <2%> for <5> minutes, within an hour of a deploy
Phase	<when it applies: always, during deploys, during migrations>	Any deploy
Ruling	<the decision, made in advance>	Roll back first. Debug afterward, on the old version.
Notes	<how to recognize it, who can override it, why we decided this>	The on-call engineer decides alone. Rolling back needs no approval.

Real SOPs to compare

- The Apollo 11 flight mission rules: the final rules for the first Moon landing, approved by Chris Kraft and laid out in columns for the condition, phase, and ruling.
- The STS-117 flight rules annex: Shuttle rules for a 2007 space station mission, written as if-then rulings with a rationale under each.
- The Prometheus Operator runbooks: one page per alert in kube-prometheus, saying what it means, its impact, and how to diagnose and mitigate it.

Story and sources: trailhq.com/blog/sop-template