SOP-<ID>: <Title>

The next page shows this template filled out. Word and Google Docs versions to edit, with 64 more examples: trailhq.com/blog/sop-template

Field	What to write
Version	<1.0>, effective <date>
Owner	<role>
Next review	<date>
Last tested by	<name, date>
Purpose	Prevents <the failure this SOP exists to stop>.
Scope	Covers <who, where, and which systems>. Doesn't cover <what's left out>.
Trigger	Start when <event>. Don't start if <condition>.
Done when	<observable end state>.
Format	<checklist, runbook, work instruction, step-by-step, decision table, handoff, or if-then rules>
Roles	<who does it> · <who checks> · <who can stop the work>
Before you start	<access, tools, inputs, time needed>

Steps

#	Step	Check	Why
1	<Verb> <object>.	<what you'll see if it worked>	<reason, for any step people are tempted to skip>
2	WARNING: <hazard>. <Verb> <object>.	<...>	<...>

If it goes wrong

If	Then
<check fails, recoverable>	<fix>, then repeat the check.
<check fails, not recoverable>	Stop, <safe state>, tell <role>.
Never alone	<steps that need a second person or a second channel>

Records: <what to log, where, how long to keep it>

Change log

Version	Date	What changed	Why
<1.0>	<date>	<what changed>	<why, e.g. incident link>

SOP-HR-001: Employee Onboarding

A filled example of the template on page 1. The company, dates, and tools are made up.

Field	Example
Version	1.2, effective January 5, 2027
Owner	People operations lead
Next review	July 5, 2027
Last tested by	A sales manager who didn't write it, December 14, 2026
Purpose	Prevents a new hire from starting without accounts, equipment, or a first-week plan.
Scope	Covers every new full-time employee, in any department. Doesn't cover contractors or offboarding.
Trigger	Start when the offer is signed and the start date is set. Don't start on a verbal yes.
Done when	The new hire has signed in to every system on their access list, IT has closed their test ticket, and the manager has logged the day-30 check-in.
Format	Step-by-step
Roles	People ops runs it · the hiring manager checks it · IT can hold access until the laptop is enrolled
Before you start	Signed offer, start date, job title, manager's name, and the access list for the role

Steps

#	Step	Check	Why
1	People ops opens the onboarding checklist 5 business days before the start date.	Every task has an owner and a due date.	A task with no owner gets skipped.
2	IT creates the accounts on the role's access list and ships the laptop.	Every account on the list exists, and the courier shows the laptop as delivered.	The new hire can work on day 1.
3	The hiring manager assigns a buddy and books the first-week meetings.	The buddy and the meetings are on the new hire's calendar.	The new hire knows who to ask.
4	On day 1, the new hire signs in to every system on the access list.	The new hire opens a test ticket with IT from their own account, and IT closes it.	A closed ticket proves that email, sign-in, and the help desk all work.
5	In week 1, the new hire finishes security training and signs the policies.	The training system shows both as complete.	Customer data access depends on both.

#	Step	Check	Why
6	On day 15, people ops reviews the checklist.	Every task is done, marked as not needed, or has a new date.	There's still time to fix a missed task.
7	On day 30, the hiring manager holds a check-in and closes the checklist.	The check-in notes are saved, and the checklist is closed.	The process ends on a date, with a sign-off.

If it goes wrong

If	Then
A sign-in fails on day 1	The ticket stays assigned to IT until the new hire confirms sign-in works.
The laptop hasn't arrived by day 1	IT issues a loaner the same day.
The checklist is still open after day 30	People ops takes the open tasks to the department head.
Never alone	Admin rights and access to payroll or production need the system owner's approval as well as the manager's.

Records: The closed checklist, saved in the employee's HR file for as long as the file is kept

Change log

Version	Date	What changed	Why
1.2	January 5, 2027	Added the day-1 test ticket	A new hire went a week without help desk access