

How to Write an SOP Your Team Will Follow

Most agency SOPs get written once and ignored forever. This guide fixes that.

Why Most SOPs Fail

Three root causes:

1. Too much detail in the wrong places. SOPs that explain why instead of what to do get skipped.
2. Stored in the wrong place. An SOP in a folder nobody opens is useless. It must live next to the task.
3. Written for the writer, not the reader. If the person doing the task can't follow it without asking questions, it's not done.

The Right Format for Every SOP

Field	What to write
Title	Specific action — "Send Welcome Email After Contract Signed" not "Client Onboarding"
Owner	Who is responsible for this process running correctly
Trigger	What event starts this process (e.g. "Contract signed and payment received")
Steps	Numbered. One action per step. Use screenshots/Looms where helpful.
Output	What "done" looks like. The doer should be able to self-check.
Edge cases	What to do when something unexpected happens.
Last reviewed	Date. If over 6 months old, treat as suspect.

SOP Template — Copy This

Title: _____

Owner: _____ Trigger: _____ Est. time: _____

Last reviewed: _____

Steps:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

What "Done" Looks Like:

— _____
— _____

If Something Goes Wrong:

Where to Store SOPs

Rule: the SOP lives where the task lives.

ClickUp task template? Attach the SOP as a doc in that task.

Recurring ClickUp list? Pin it as a description or pinned task.

Notion? Link it from the database view for that process.

Never store SOPs in a separate "SOPs folder" that isn't connected to where work actually happens.

The 3 SOPs to Write First

1. Client onboarding — from signed contract to first deliverable.
2. Weekly project update — how and when clients get status updates.
3. New task setup — how work gets created, assigned, and tracked.

Getting Your Team to Actually Use Them

Write the SOP with the person who does the task, not for them.

Review it together after the first time they use it.

Build SOP review into your monthly ops meeting — 15 minutes.

When someone asks how to do something, point them to the SOP instead of answering.

Guide by Runflow — runflowagency.com