



The Ultimate SOP and process documentation checklist

Before getting started

- Involve the right people and set subject matter experts
- Choose the right SOP software to help you
- Get your mindset right!

Document

- Use the 80-20 rule to identify the essential processes to document
- Document core process using time-saving methods like templates and AI Assist
- Organize documentation into a central repository for scalability
- Use simple direct language
- Name SOPs appropriately
- Keep to a standardized format and layout
- Utilize the Netflix effect to make SOPs and processes engaging

Train

- Share processes with the right people and ensure that SOPs are followed by everyone
- Identify essential training and set up training flows
- Assess and reward knowledge using quizzes to combat the forgetting curve

Measure

- Identify & close the gaps
- Continuously improve by reviewing SOPs

TRY WHALE FOR FREE

or go to usewhale.io