

Standard Operating Procedures (SOPs): The "Bus Test" Standard

At **TheOwnersProject.com**, we believe that a business should be built on systems, not just personalities. If a task is performed more than three times, it requires an SOP. Our **Standard Operating Procedure (SOP) Template** is the secret to building an organization that can run without the owner's constant intervention. It is designed for "extreme clarity," ensuring that anyone with basic training can step in and complete a task to your exact standards—passing the "**Bus Test**".

The Anatomy of a High-Performance SOP

Our template forces a rigorous breakdown of a process to ensure no details are lost in translation:

- **Purpose & Scope:** We clearly define what the process accomplishes and who is responsible for its execution, ensuring everyone understands its importance to the company's cash flow or operational success.
- **Pre-Requisites & Tools:** Before a team member begins, they are given a checklist of exactly what they need—from software access and login credentials to specific physical files.
- **The Step-by-Step Workflow:** We utilize "Action Verbs" (e.g., Click, Type, Open, Send) to create numbered, unmistakable instructions for the user.
- **Quality Control & Troubleshooting:** We define the **Success Criteria** so the user knows they did the job right, and provide a roadmap for what to do if the process breaks.
- **Review & Approval:** Every SOP includes a designated **Approver** to sign off on the work, maintaining a final layer of accountability.

The Owners Project "Pro-Tips"

We go beyond static text to ensure your procedures are "living" documents:

- **The Loom Method:** We encourage users to record a quick video of themselves performing the task and embed the link directly into the workflow for visual learners.
- **Visual Aids:** We include screenshots of software buttons and interfaces to eliminate any guesswork during execution.
- **Baking in Lessons:** When a **Post-Mortem** or **Lessons Learned** log identifies a better way to work, we immediately update the SOP so the improvement is permanently integrated into the business.

By institutionalizing your knowledge through these SOPs, you transform individual expertise into a durable company asset that scales.

Standard Operating Procedures (SOPs) are the secret to a business that can run without the owner. If a task is done more than three times, it needs an SOP.

*The goal of this template is **extreme clarity**: someone with basic training should be able to read this and complete the task to your exact standards.*

STANDARD OPERATING PROCEDURE (SOP)

Process Name: _____

Department: _____ **Version:** _____

Last Updated: _____ **Owner:** _____

1. Purpose & Scope

What does this process accomplish, and why is it important? Who is responsible for following it?

Example: To ensure all client invoices are sent accurately and on time, maintaining company cash flow.

2. Pre-Requisites / Tools Needed

What does the user need to have ready before they start?

- Access to software (e.g., QuickBooks, CRM)
- Log-in credentials
- Specific physical files or hardware

3. The Step-by-Step Workflow

Break the process down into clear, numbered actions. Use "Action Verbs" (Click, Type, Open, Send).

1. **Step 1:** _____

2. **Step 2:** _____

3. **Step 3:** _____

4. **Step 4:** _____

4. Quality Control & Troubleshooting

How do they know they did it right? What should they do if something breaks?

- **Success Criteria:** (e.g., "The client receives a PDF confirmation email.")
- **Common Issues:** If [Problem A] happens, do [Action B].

5. Review & Approval

Who must sign off on this work (if anyone)?

- **Approver:** _____

The Owner's Project Pro-Tips for SOPs:

- ***The Loom Method:*** Encourage users to record a quick 2-minute video of themselves doing the task and embed the link directly into the "Step-by-Step" section.
- ***The "Bus Test":*** If your key employee was hit by a bus tomorrow (metaphorically!), could a temporary replacement follow this SOP and get the job done?
- ***Visual Aids:*** If the task involves software, include screenshots of the specific buttons they need to click.