

The SOP Master Binder

A starter library of documented procedures, three real examples plus blank templates, so the knowledge in your business lives on paper, not only in one person's head.

How to use this binder: read the three example SOPs first, they show what "good" looks like at the right level of detail. Then use the blank templates to document your own highest-priority tasks, the ones that touch customers most, that new hires struggle with most, or that only one person currently knows how to do.

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- Example: Handling a Customer Complaint
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1. How to Build Your SOP Library

An SOP (standard operating procedure) is a written answer to "how do we do this?" for one specific, repeatable task. The goal isn't a thick manual nobody reads, it's a set of short, specific documents that actually get used.

Where to Start

Don't try to document everything at once. Start with the tasks where inconsistency is most expensive: the ones that directly touch customers, the ones new hires struggle with most, and the ones where only one person currently knows how to do it correctly.

Writing One That Gets Used

- Keep it to one page. A ten-page document gets ignored; a one-page checklist gets read.
- Write it the way you'd explain it out loud to a new hire on their first day: plain language, specific steps.
- Include the why, briefly. "Confirm the gate code before the crew arrives" is a step. "Confirm the gate code so the crew isn't standing around losing billable time" is a step someone actually remembers.
- Build in a revision habit. Revisit key SOPs once or twice a year, an SOP that's never updated becomes wrong the moment the business changes something.

Your Priority List

List the 5 tasks most worth documenting first, in order.

- 1.
- 2.
- 3.
- 4.
- 5.

Example SOP: Quoting a Job

Task Name: Quoting a Job

Why It Matters: Inconsistent quotes create pricing confusion, lost margin, and customers who feel like the price depends on who they talked to.

Steps

1. Confirm the scope directly with the customer: what exactly are they asking for, and is there anything unusual about the site or job.
2. Check the job against the standard pricing sheet for the closest match.
3. Add any site-specific factors (access, materials, timeline) using the standard adjustment guide, not a gut-feel number.
4. Note any assumptions the quote depends on (e.g., "assumes standard soil conditions") directly on the quote.
5. Review the total against the minimum acceptable margin before sending.
6. Send the quote within 24 hours of the request, even if it's a rough range while details are confirmed.
7. Follow up within 3 business days if there's been no response.
8. Log the quote (won, lost, or pending) in the tracking system.

Who's Responsible: Whoever takes the initial customer inquiry, reviewed by the owner or manager for jobs over the standard threshold.

Example SOP: Handling a Customer Complaint

Task Name: Handling a Customer Complaint

Why It Matters: How a complaint is handled matters more to most customers than the fact that something went wrong in the first place. A well-handled complaint can build more loyalty than a problem-free job.

Steps

1. Listen fully before responding. Let the customer finish explaining before offering a solution or explanation.
2. Acknowledge the issue directly, without being defensive: "I understand why that's frustrating, let's fix it."
3. Get the specifics: what happened, when, and what resolution the customer is expecting.
4. If you can resolve it on the spot within your authority, do it immediately.
5. If it needs manager approval, tell the customer exactly when they'll hear back, and follow through on that timeline.
6. Document the complaint and resolution in the customer's record.
7. Follow up after the resolution to confirm the customer is satisfied.
8. If the complaint points to a real process gap, flag it for the relevant SOP to be updated.

Who's Responsible: Any customer-facing team member for the first response; manager for anything requiring a refund, discount, or exception.

Example SOP: Daily Opening Safety Check

Task Name: Daily Opening Safety Check

Why It Matters: A quick, consistent check catches small problems (a loose ladder rung, a low fluid level, a blocked exit) before they become an incident, an insurance claim, or a missed workday.

Steps

1. Walk the work area or vehicle before the first task of the day.
2. Check that all required PPE is present, undamaged, and accessible.
3. Inspect equipment scheduled for use that day for visible damage or wear.
4. Confirm emergency exits, first aid kits, and fire extinguishers are accessible and not expired.
5. Note any hazard specific to today's job site (weather, terrain, nearby traffic) and brief the crew before starting.
6. Log the check as complete, with any issues flagged, before work begins.
7. Report anything unresolved to a manager immediately, don't wait for end of day.

Who's Responsible: Crew lead or first team member on site each day.

Blank SOP Template A

Task Name:

Why It Matters (one line):

Steps

- 6.
 - 7.
 - 8.
 - 9.
 - 10.
 - 11.
 - 12.
 - 13.
-

Who's Responsible:

Last Updated:

Blank SOP Template B

Task Name:

Why It Matters (one line):

Steps

14.

15.

16.

17.

18.

19.

20.

21.

Who's Responsible:

Last Updated:

Blank SOP Template C

Task Name:

Why It Matters (one line):

Steps

22.

23.

24.

25.

26.

27.

28.

29.

Who's Responsible:

Last Updated:
