5 Secrets to Effective SOPs for Engineering Teams

Every organization should have standard operating procedures (SOPs) in place for every major process (and we would argue even minor ones), and while most do because they're required, SOPs must provide users an easy to follow journey that leads to a successful outcome. Without clear SOPs, your team may:

- Miss steps
- Miss or ignore tested and viable solutions
- Generate disastrous consequences that may lead to injuries, lost time, and miscommunications

If your team struggles to follow SOPs, it's probably not their fault. Too often, SOPs are simply hard to use and follow so humans, being what they are, resort to figuring it out themselves or, barring that, ask someone who's done the job before to help them.

SOPs aren't that difficult to write, but many organizations fail to write SOPs using proven techniques that result in easy to read and follow SOPs.

Here are five secrets to writing effective SOPs for engineering teams.

1. Profile your users.

We've all heard this one—know your audience! Here's the problem with that advice: it doesn't ask writers to analyze how their readers will use a particular document. A writer must consider the following about SOP users:

- What they know and don't
- What they need to know and when they need to know it
- How they're going to use the SOP

Taking the time to create an in-depth audience checklist can save you time and ensure the SOP meets readers' needs.

2. Use graphics that are appropriate and useful.

Graphics should augment or support the text. They shouldn't be used simply because they can be, and they should be stand-alone. I know this sounds contradictory to the previous sentence, but hear me out. Graphics should pass the "grunt" test meaning they should be able to be understood within five seconds.

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3. Use simple language.

I know—this doesn't seem like a secret at all. But the key is how do you ensure that the language you're using is "simple?" In general, "simple" is language that can be understood by the average sixth grader. Remember that the goal of an SOP is to help the user complete a task successfully and simple language helps with that.

4. Format for readability.

Have you ever tried to use an SOP that was so poorly formatted that you couldn't make heads or tails out of it? Believe it or not, formatting SOPs so that the user can quickly find the required information when it's needed makes a huge difference! For instance, adequate white space helps users find information quickly and follow the steps more easily, as do headings and subheadings that cue readers in on expectations.

5. Set expectations.

The information in SOPs and how it's organized set expectations. So, effective SOPs include sections that help users prepare for the information. Such sections may include:

- Responsibilities
- Stakeholders
- Glossaries
- Lists of acronyms and
- Equipment and materials, among others.

Don't sacrifice usability for economy of space; that is, you're better off to have a longer SOP that includes the necessary sections than a shorter SOP that doesn't.

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Application Tool

Element	Answer
List five things about how your user will use the document.	
List the graphics you intend to use and provide a rationale for their use.	
Are there words your organization typically uses in SOPs that can be simplified? If so, what are they?	
What sections are essential in your SOP?	
If your organization has a template for its SOPs, then are there areas that could be improved?	

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