



Standard Operating Process Narrative Template

Processes:

Date Created: [Click here to enter a date.](#) **Last Updated:** [Click here to enter a date.](#)

Created By: **Updated By:**

Overview: Briefly describe the general purpose/goal of the business process/procedure being documented. What does the business process accomplish? This section should answer the question, why do we do this procedure.

Criticality: Choose an item.

Frequency: Choose an item.

Turnaround: Choose an item.

Processing Time: How long does it typically take to complete this process (1 hr, ½ day, 2 days, etc.)

Start Date: When does this process start (e.g. beginning of month, mid-month, etc.)?

How Triggered: What causes the process to start (e.g. receipt of report, invoice, etc.)?

Due Date: When is this process due by?

Process Owner(s) / Key Parties / Contacts / Responsibilities:

List all the key parties and their contact information involved with this process (who do you receive information from? Who do you pass information to?). List the responsibilities associated with each role involved in this procedure.

Include both internal and external parties (e.g. vendor contact info).

Key Documents / Sources of Information:

List all the key documents and sources of information needed to complete this business process including who or how they are received or obtained.

Insert sample documents directly into this document (Word, Excel, PDF, etc.)

This is where you put in the “how to” with specific step by step instructions. This section should answer the question, how do you do this procedure.

If applicable, diagrams or drawings can be utilized in this section to compliment the step procedures.



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System Access Needed:

List the systems you will need to have access to in order to complete this process (e.g. QuickBooks, Scale House Software, etc). What access is needed (e.g. accounts, depts, roles, etc.)?

Also identify who else has this access and can perform this procedure in your absence. If known, identify a primary back-up for this process.

Identify any production jobs associated with this process.

Identify any system integrations needed with this process.

Common Problems or Issues Encountered:

List any problems someone is likely to encounter while doing this procedure (delays in getting required information, inaccurate information, need to follow-up with purchasing, etc.). Also include information on how to resolve the problem. Are there any bottlenecks in the process?

Key Risks

List the key things that can go wrong when executing this process?

Key Controls

List the controls that are part of the process that reduce the likelihood of the Risk (i.e. dollar threshold, data error, high volume, confidentiality, compliance) from occurring. Please include any system controls, process controls and user controls.

Process Inefficiencies To Be Addressed:

Document any process inefficiencies you noted that need to be addressed that cannot be immediately changed for some reason (e.g. requires customer to change their process, requires a system change, etc.).



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Process:

Document any process, inflows, outflows or exceptions, if applicable.

Metrics:

Document any procedural measures or metrics, if applicable.

Glossary of key terms/acronyms:

Document any key terms or identify the meaning of any acronym used in this document.