CORE CONCEPT

Process Management and SOP Development: Writing Standard Operating Procedures

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Technical depth: Practitioner · **Practical mode:** Inspection walkthrough

Introduction

Procedures in many organisations are written once for an audit, stored in shared folders and rarely match how the work is actually done. Staff then rely on memory and informal workarounds, results vary between shifts and sites, and knowledge leaves with experienced employees. This Core Concept course equips the people who document processes to build a process architecture, model processes to a recognised notation, write SOPs that front-line staff can follow and verify them by walking the process. Participants leave with a Controlled SOP Pack for a process in their own organisation.

Course Objectives

- Structure an organisation's processes into a documented architecture with named owners using the APQC Process Classification Framework and RACI
- Model processes with SIPOC, BPMN 2.0 and turtle diagrams to a consistent standard
- Write clear SOPs and work instructions that front-line staff can follow without further explanation
- Build risk controls, error-proofing, performance measures and document control into each procedure
- Produce a Controlled SOP Pack for a process in their own organisation, verified by a structured walkthrough

Target Audience

- Process and quality officers responsible for documenting and maintaining procedures
- Operations supervisors accountable for consistent task execution across shifts or sites
- Business analysts mapping processes for improvement or system projects
- Document controllers managing procedure versions, approvals and distribution
- Internal control and compliance officers testing procedures against actual practice
- Training coordinators converting procedures into on-the-job instruction

Course Outline

Day 1: Process Management Foundations and Process Architecture

- Process Approach Principles in ISO 9001:2026
- Process Architecture Using the APQC Process Classification Framework 7.4
- Process Hierarchy from Level 1 Value Chain to Level 4 Task
- Process Owner Role Charter and RACI Matrix
- Current-State Process Inventory and SOP Gap Register

Day 2: Process Modelling Notations and Documentation Standards

- SIPOC Scoping for Process Boundaries
- BPMN 2.0 Notation Following ISO/IEC 19510:2013
- Process Turtle Diagram for Resources, Controls and Measures
- ISO 10013:2021 Guidance on Documented Information
- SOP Format Selection: Step List, Hierarchical, Flowchart and Checklist

Day 3: Writing and Validating SOPs

- Gemba Walk Observation Sheet for As-Is Process Capture
- SOP Template Anatomy: Purpose, Scope, Responsibilities, Steps and Records
- Plain-Language Instruction Writing Tested with the Flesch Reading Ease Score
- Visual Work Instructions and TWI Job Breakdown Sheets
- SOP Tabletop Validation with Process Performers

Day 4: Controls, Risk and Process Performance

- Process Risk and Control Matrix Aligned to ISO 31000:2018
- Error-Proofing with Poka-Yoke Devices and Checkpoints
- Process KPIs: Cycle Time, First-Pass Yield and Procedure Adherence Rate
- Document Control and Records Retention Using ISO 15489-1:2016
- Process Maturity Assessment with the OMG Business Process Maturity Model

Day 5: Inspection Walkthrough and the Controlled SOP Pack

- Warehouse Receiving Process Walkthrough Against a Draft SOP
- Service Request Handling Walkthrough: Deviations and Control Gaps
- Controlled SOP Pack Build for an Own Process
- SOP Rollout Plan and Competence Sign-Off Record
- Peer Audit of SOP Packs Using a Walkthrough Checklist

Skills You Will Gain

- Process Architecture
- Process Modelling
- Procedure Writing
- Work Instruction Design
- Process Risk Control
- Document Control
- Process Performance Measurement
- Process Walkthrough Verification

Why Attend This Course

- Return to work with a Controlled SOP Pack for a real process, already checked against a walkthrough
- Write procedures that staff actually use, so results stay consistent across shifts, sites and new starters
- Find the gaps between documented and actual practice before an auditor or an incident does
- Compare documentation approaches with colleagues from logistics, healthcare, utilities and service organisations

Conclusion

A procedure is useful only if it reflects the work as it is done and stays controlled as the work changes. The course moves from building a process architecture, through recognised modelling notations and documentation standards, to writing, validating and controlling SOPs and work instructions. The final day applies structured walkthroughs to test procedures against real process steps and produces a Controlled SOP Pack that participants can use as the model for documenting the rest of their processes.