

Building SOPs with AI

Turn What Your Team Knows Into
Clear, Repeatable Processes Fast.



CAPTURE



STRUCTURE



REVIEW



PUBLISH



IMPROVE

WHY SOPs MATTER

- Reduce errors
- Preserve knowledge
- Faster onboarding
- Improve consistency
- Prepare for automation

PICK ONE PROCESS

Start with a process that is important but not highly sensitive.

- Invoice Processing
- Employee Onboarding
- Weekly Reporting
- Social Media Posting
- Customer Inquiries
- Client Intake

CAPTURE THE PROCESS



Notes

Write down how it's actually done.



Screenshots

Capture key steps and visuals.



Scribe

Record digital workflows automatically.



Interviews

Ask the person who does the work.

USE AI TO BUILD THE DRAFT



OR



YOU:

Turn these notes into a clear SOP. Don't invent missing information. Identify questions and decision points.



AI ASSISTANT:

Here is your draft SOP:

- Purpose
- Scope
- Procedure
- Decision Points
- Exceptions
- Quality Checks
- Escalation

SOP STRUCTURE



Purpose



Scope



Owner



Prerequisites



Procedure



Decision Points



Quality Check



Escalation

SOP WORKFLOW

1



Pick Process

Choose one process to document.



2



Capture Steps

Document how it's actually done.



3



Draft with AI

Use AI to structure and organize.



4



Test & Refine

Test with someone new. Improve it.



5



Publish SOP

Share the final SOP with your team.



6



Identify Automation

Find steps that can be automated.



30-MINUTE SOP CHALLENGE

0-5



Choose one process.

5-10



Capture how it's done.

10-15



Draft with AI.

15-20



Review with process owner.

20-25



Refine and fill gaps.

25-30



Publish SOP & create checklist.



GOAL: A clear SOP + one-page checklist in 30 minutes.



DATA & PRIVACY CHECK

- ✓ Check your organization's AI policy
- ✓ Remove unnecessary data
- ✓ Never paste passwords or credentials
- ✓ Protect confidential information
- ✓ Follow applicable legal, regulatory, and contractual requirements



When in doubt, use sanitized or fictional data while testing.

QUICKSTART TOOL MAP



Draft an SOP
ChatGPT / Copilot
Free or existing plan



Organize SOP
Google Docs
Free



Create Visual SOP
Canva Docs
Free

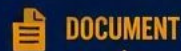


Capture Steps
Scribe
Free tier / paid upgrades



Screenshots
Built-in tool
Free

THE SPS FORMULA



DOCUMENT

Capture how the work is really being done.



STANDARDIZE

Turn tribal knowledge into a consistent procedure.



IMPROVE

Remove unnecessary steps and clarify decisions.



AUTOMATE

Use AI and automation where it makes sense.

*Don't automate chaos.
Understand the process first.*

**NEED HELP DOCUMENTING OR
AUTOMATING YOUR PROCESSES?**

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STRATEGY. SOLUTIONS. GROWTH.



START HERE: Pick one process. Capture it. Use AI. Improve it. Automate what makes sense.



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