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SOP Template - Field Service Teams

This Standard Operating Procedure (SOP) template is a practical, high-value format for real field teams. It includes clear guidance, placeholders, checklists, safety blocks, and workflow standards.

1. Process Title & Description

- Process Title: _____
- Description: Provide a brief summary of what this process covers, when it is used, and who is responsible. This section helps technicians quickly identify the process.

2. Purpose of the Task

Explain why this task exists. Describe the operational, safety, customer experience, or compliance goals this SOP supports.

3. Scope

This SOP applies to:

- Field Technicians
- Dispatch Team
- Supervisors / Managers
- Office & Support Staff

This SOP covers:

- Job preparation
- On-site execution
- Safety steps
- Documentation & job closure

4. Roles & Responsibilities

| Role | Responsibilities |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Technician | <ul style="list-style-type: none">• Perform task as per SOP• Follow safety guidelines• Document photos, notes, parts• Collect signatures and update system |
| Dispatcher | <ul style="list-style-type: none">• Assign jobs• Provide accurate job details• Monitor progress & assist technicians |
| Supervisor | <ul style="list-style-type: none">• Ensure SOP compliance• Approve job closures• Manage escalations |

5. Tools & Materials Needed

List tools, equipment, safety PPE, and materials required:

- Tools: _____
- Materials: _____
- PPE Required: _____

6. Step-by-Step Work Instructions

Write consistent, simple, repeatable steps for completing the task. Clarity reduces errors.

- Step 1 - Preparation: _____
- Step 2 - Arrival & Customer Check-in: _____
- Step 3 - Perform Task: _____
- Step 4 - Verification & Testing: _____
- Step 5 - Documentation & Photos: _____
- Step 6 - Customer Confirmation: _____

7. Safety Guidelines

Include required PPE, hazard awareness, lockout/tagout rules, electrical safety, equipment handling, and environmental precautions.

- PPE required: _____
- Hazards to watch for: _____

- Emergency actions: _____

8. Quality Checklist

Job instructions followed accurately

All photos and notes uploaded

Customer approval collected

Parts & materials logged correctly

System updated to 'Completed'

9. Documentation & Records

List forms, photos, reports, or digital records required after the job.

10. Approval & Review Date

Approved By: _____

Designation: _____

Approval Date: _____

Next Review Date: _____