**INSTRUCTIONS & CONSIDERATIONS**

The overview template is used to provide a general overview of the process, the why, the when, the who and additional elements.

Usage Notes:

* This page should be included in every guide.
* Items in [brackets] should be updated before publishing. Brackets should be removed.
* Items in <carrots> should be deleted before publishing.

***DELETE TEXT WITHIN THESE LINES BEFORE PUBLISHING.***

## **Overview**

### **⭐️ What does this SOP cover:**

*<This field should explain what the SOP is. For example, "This SOP covers how to populate a competitive assessment.">*

This SOP covers [insert text]

### **🔥 Why this is important:**

*<This field should include one or two sentences about why following this SOP is critical.>*

This SOP is important bc [insert text]

### 

### **📅 When is this done:**

*<This field describes the frequency at which one would need to follow this SOP.>*

### 

### **🙋Who is responsible for accurate execution:**

*<This is the person(s) or titles of who would lead the charge. In some cases, this may be every team member.>*

### 

### **🎉 Who else is involved:**

*<Bullet point list of the parties that are also involved.>*

## 

### **🔎 Additional Details:**

* SOP Owner/Approver: [Name/Title]
* Last Revised: [YYYY.MM.DD]
* SOP Revision Frequency: [Monthly, Quarterly, Annually]

**INSTRUCTIONS & CONSIDERATIONS**

When to use/include this page

* For Overarching/Umbrella Processes

Design notes:

* Items in [brackets] should be updated before publishing.
* Items in <carrots> should be deleted before publishing.
* Utilize links to other cards or resources.
* Use bold text to call out the main action when wordy
* Each step should literally only be one step.

***DELETE TEXT WITHIN THESE LINES BEFORE PUBLISHING.***

### **⭐️ General information**

This SOP covers [pull information from the overview] and should be used [when doing what].

### **📕 Terms to know**

*<List acronyms or marketing terms with definitions>*

# **📋 THE CHECKLIST**

| **Step #** | **Description** | **Responsible Party** |
| --- | --- | --- |
| 1 |  |  |
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***INSTRUCTIONS & CONSIDERATIONS***

When to use/include this page

* For processes that need a bit more detail
* For processes where steps require additional language or images
* For processes where there is only one party requiring action
* For extremely simple processes

Design notes:

* Items in [brackets] should be updated before publishing.
* Items in <carrots> should be deleted before publishing.
* Utilize links to other cards or resources.
* Use bold text to call out the main action when wordy
* Each step should literally only be one step.

IMPORTANT TIP: 💡

* When there are multiple phases in the checklist, separate the steps with the "headline" formatting.

***DELETE TEXT WITHIN THESE LINES BEFORE PUBLISHING.***

### **⭐️ General information**

This SOP covers [pull information from the overview] and should be used [when doing what].

### 

### **📕 Terms to know**

*<List acronyms or marketing terms with definitions. Use Bullet points>*

# **📋 THE CHECKLIST**

**Step 1**: <**populate** each step using **bold formats** to call out key phrases.

* Feel free to use bullet points below each step for additional context
* You can also add images or links to other references>

**Step 2**:

**Step 3**:

**Step 4**:

**Step 5**:

**Step 6**:

**Step 7**:

**Step 8**:

**Step 9**:

**Step 10**:

**Step 11**:

**Step 12**:

**Step 13**:

**Step 14**:

**Step 15**:

**Step 16**:

**Step 17**:

**Step 18**:

**Step 19**:

**Step 20**:

**Step 21**:

**Step 22**:

**Step 23**:

**Step 24**:

**Step 25**:

**Step 26**:

**Step 27**:

**Step 28**:

**Step 29**:

**Step 30**:

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