

Rooted Strategy

Standard Operating Procedure Template

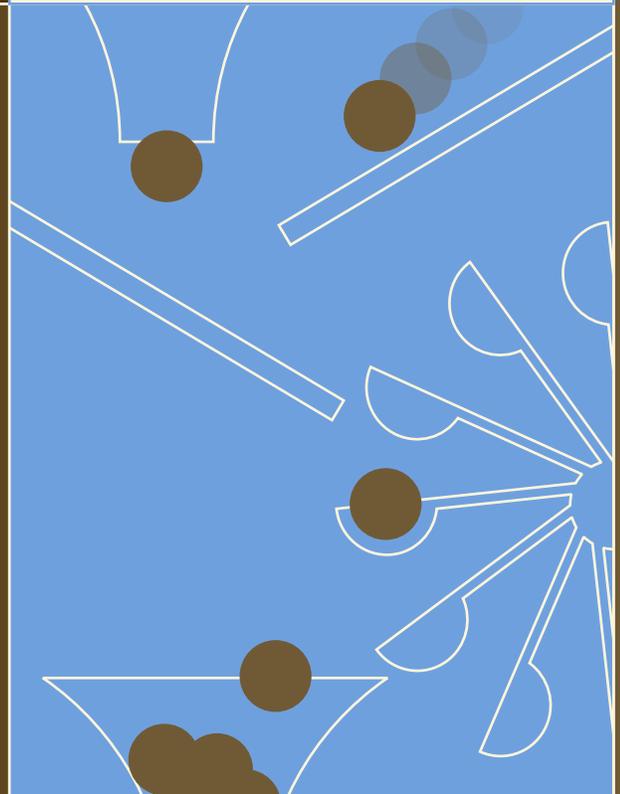
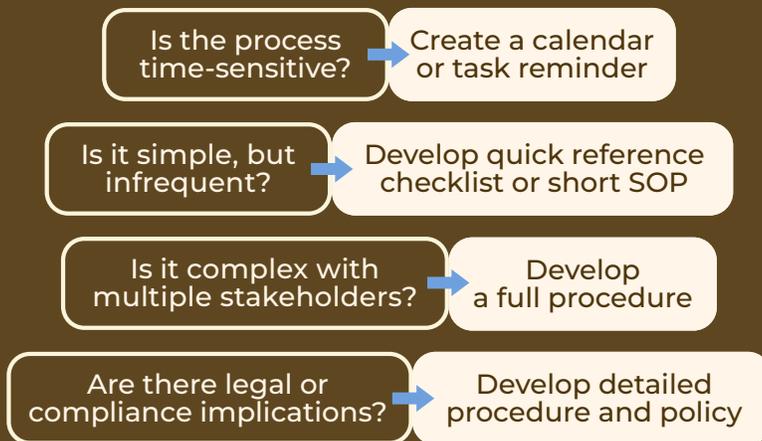
Use our template to create your own Standard Operating Procedures (SOPs). Section descriptions make it clear what to write, as well as what to expect

Copy the template on the next page and paste into your editor of choice. Or use our **platform-specific templates**:
[Google Docs](#) | [Notion](#)

CHECK IT OUT: Example SOP on Page 3

Do I need a full SOP?

Some processes may require an SOP, while others will not. Here's a **quick guide** to get you going in the right direction!



SOPs range from simple to complex

SIMPLE ←—————→ **COMPLEX**

Straightforward and consistent steps ————— Multiple decision points

One person can handle it solo ————— Multiple people/roles/departments

Priority: get it done quick and correct ————— Priority: compliance and quality control

We can help! Book a call at rootedstrategy.com

Process Name: [What are you documenting?]

Owner: [Which person/department is responsible for completing this process?]

Date Created: [When was this SOP created?]

Last Updated: [When was this SOP last updated?]

Next Review: [When do you need to check it for updates again? Remember to a calendar or task reminder]

Purpose

What does this process accomplish?

[Brief description or list of the goals and benefits of this process]

When do we use this process?

[Triggers or timing]

Who is involved?

[Key stakeholders, people, departments, or roles involved]

When we don't follow this process...

[Brief description or bullet list of the risks/symptoms associated with not following this SOP]

Resources

List the resources and tools required to complete the process. This may include...

- Key files, documents, or templates
- Other existing SOPs or information
- Systems, technology, or software access
- Who to contact for help

Steps

1. [Phase name]

- [Action step - focus on what to do and the expected result, not how to click]
- [Who to hand this off to, if anyone]
- [Quality check or verification]
- [Decision point: If this happens, do that]

2. [Phase name]

- [Action step]
- [Who to hand this off to, if anyone]
- [Quality check or verification]
- [Decision point: If this happens, do that]

3. [Phase name]

- [Action step]
- [Who to hand this off to, if anyone]
- [Quality check or verification]
- [Decision point: If this happens, do that]

4. [Phase name]

- [Final action]
- [Documentation or follow-up needed]

Signs of Success

What are the specific outcomes, impacts, and/or deliverables that show us we've completed the process perfectly?

- [Sign of success]
- [Sign of success]
- [Sign of success]

Sample SOP Opening Rooted Café

Owner: Rooted Café Management Team

Date Created: August 10, 2025

Last Updated: August 21, 2025

Next Review: August 10, 2026

Purpose

What does this process accomplish?

Rooted Café opens on time, with barista station, lounge area, and bathrooms clean and organized, ready for café team and patrons to have a great, comfortable experience.

When do we use this process?

Every day of operation, one hour before open.

Who is involved?

All scheduled Rooted Café team members are required to assist in opening process.

When we don't follow this process...

Frustration from disorganized/unclean workstation, missing or low ingredients, less efficient order fulfillment, and lack-luster patron experience, negatively impacting team readiness, tips, revenue, and patron satisfaction.

Resources

- Rooted Café front key or back door key code
- Rooted Café security alarm code (given to all staff)
- Rooted Café House Blend coffee beans
- Rooted Café Barista Handbook
- Cleaning supplies
- Inventory sheet

Steps

1. Enter and Secure Store

- Keyholder unlock café one hour before open. Lock after entering and turn on all lights.
- Immediately disable security alarm system using code.
- Examine café to ensure it's safe and welcoming for team and patrons.
- Unlock door for any scheduled café team members or delivery personnel, then relock.
- All café team members clock-in upon arrival, after alarm is disabled.

2. Inventory Check and Store Clean-up

- Ensure closing duties were completed by closing team; notify team lead if incomplete.
- If necessary, clean barista station, lounge, and bathroom. Team lead review cleanliness.
- Confirm all critical equipment is operational (espresso machines, fridges, sinks, etc.).
- In case of special or serious maintenance, security, or cleanliness concerns, contact manager immediately.

3. Inventory and First Brew (30 min brew time)

- 30 minutes before open, brew two dispensers of coffee for morning rush. Follow barista handbook for brewing instructions. Replenish every 3 hours or as needed.
- Count and log inventory of coffee beans, milk products and alternatives, and other items (see Inventory Sheet in barista station for full list).
- Inspect beverage items and ingredient levels. Replenish low items, and replace expired items.
- If needed, restock self-serve supply station with napkins, lids, straws, etc.

4. Open Store

- Once time to open, unlock front door and flip sign from "CLOSED" to "OPEN."
- Turn on speaker system and play music (please keep it appropriate and low to medium volume).
- Maintain a clean, welcoming, and safe environment for team and patrons.

Signs of Success

What are the specific outcomes, impacts, and/or deliverables that show us we've completed the process perfectly?

- Barista workstation is clean, organized, and fully stocked to accommodate all barista needs for a full shift.
- Café is clean, inviting, and comfortable for patrons and café team.
- Hot drip coffee is ready and available as soon as café opens.
- Bathrooms are clean and sanitary.
- Inventory is fresh, and low stock items are logged for replenishment.