

GROWERTALKS

Features

11/28/2025

SOPs in 1-2-3

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“What’s an SOP?” I asked about seven years ago in a client meeting. As we would say in the South, “Bless.” You see, I’m a horticulturist in training and at heart. All of this business-running stuff I’ve picked up on my own. Official marketing terminology? Thank goodness for the Internet! (I didn’t fully grasp what ROAs meant until quite a ways into my marketing business journey.) That’s a long-winded setup for this question:

What is in an SOP?

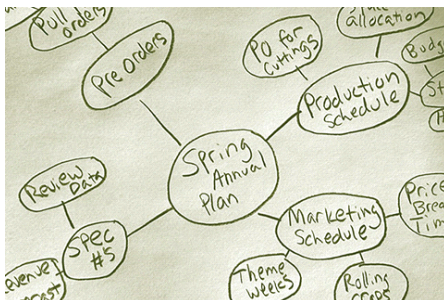
SOP stands for “Standard Operating Procedure.” Chances are good that you already have a lot of SOPs at your business, but they might be implicit instead of explicit; that is, SOPs that are commonly understood, but not written down anywhere.

With our entire industry in the middle of a generational change, it’s imperative to get SOPs written down in order to provide for smooth transitioning and to capture generational knowledge. Having accurate SOPs also makes it much easier to train new staff.

Why bother making SOPs?

What we do in horticulture is a series of repeatable events. Beyond the net gains of easier staff training, providing SOPs creates a more consistent customer experience. And a better customer experience means a better bottom line for your business. Guidelines also create a better staff experience by delineating exactly what people should be doing and how they should do it. Guidelines and boundaries provide psychological safety. If there’s wiggle room in how something gets done, say so in the SOP!

SOPs hold leadership accountable, which is another plus for staff experience. They also help organizations gain efficiency. Why continually reinvent the wheel?



Mindmap image: Mind Maps don’t have to be complicated! Grab a piece of printer paper and a pen and start mapping. If you want to use different colors for fun, go for it!

Does every process need a written SOP?

Not necessarily. If you overwhelm people with documentation, they won’t look at any of it. Here’s how to decide if you should spend time documenting a process:

Ask yourself these questions:

- Does the task need to be done the same way each time? If yes, make an SOP.
- Is the task something that requires several complicated steps and a checklist? If yes, make an SOP.
- Can the task be delegated to someone other than the person currently doing it? If yes, make an SOP.
- Is the task vital to your business and something only you or one other person knows how to do? If yes, make an SOP.

Example tasks that need SOPs:

- Running payroll
- Entering customer orders into fulfillment software
- Using project management software for specific workflows
- Email marketing QA (quality assurance) checking before sending
- Closing up the office/greenhouse/facility
- Operating machinery

Now, will everyone look at the SOP every time they do these tasks? No! Once you've done most of these, you know how. But these SOPs will be useful for training and delegating and you can't grow if you can't delegate. At my company, we DO use our email QA SOP every time we QA an email because if you miss a step, you create potential communication headaches. Part of the SOP is noting when the SOP must be used!

Example tasks that don't necessarily need written SOPs, but DO require training and managing:

- Watering
- Sticking cuttings
- Filling pots
- Pruning
- Tidying work areas

What's the difference between an SOP and training information?

So glad you asked! Whether there's a difference is up to you. I'd say that SOPs are always training materials, but training materials are not always SOPs because they don't always contain detailed information with step-by-step instructions specific to one business.

For example, many plant brands provide training materials with info about plant varieties or growing protocols, but those aren't necessarily SOPs.

What's in an effective SOP?

Pretend a visitor from another planet needs to use the SOP to perform a task—that's the level of specificity that makes an SOP useful. It should contain:

- Task name
- Task goals and purpose: Why does this task matter? What happens if it isn't done timely and properly? Who does a failure impact? Who does a success impact?
- Location: Where does this happen? In the greenhouse? In the field? In the office?
- Assets needed: A list of resources, including: People (role-based because people change)

| Software | Materials, tools, supplies | Links to files needed

- Steps: Detailed instructions on how to perform tasks (pictures and/or videos are always welcome!)
- “What Done Looks Like”: A description of the desired outcome

Is an SOP always in a document?

No! SOPs can take various forms, including:

- Documents: A Google doc, Word doc or another written document
- Videos: As long as the video contains everything needed, it can be an SOP (though I recommend having a written and video form and not just video because some people process information better when it's in written form and others when it's in video form)
- Screencasts: A form of video that's a recording of what you're doing on screen. Loom is a software that facilitates screencast videos. These are great for office tasks. Loom will generate a transcript that can be turned into a series of steps.
- Project management workflows: Some might argue that a workflow in Airtable or Monday.com isn't actually an SOP. I can see their point. However, if it's a documentation-based task for which you can create an SOP and then get it into a workflow software to allow everyone to collaboratively implement the SOP, it's a win-win and more likely to be used than something sitting on a shelf (more about that in a bit).

What's the easiest way to create an SOP?

There are so many tools to help create SOPs these days. Which one works for you depends on how you think. Here are some techniques:

- Using dedicated programs: Software like Scribe or Whale can help in documenting procedures. These will record your keyboard clicks and take screenshots. You can edit the descriptive text to ensure it is correct.
- Video walkthroughs: Recording processes with a phone walkthrough and using tools like Loom for screencasts can create visual SOPs. If you use Loom, you can copy the transcript generated and put it into ChatGPT or Google Gemini and ask the programs to generate step-by-step bullet points.
- Mind mapping: If you're not really a linear thinker, but think in clusters of information, mind mapping is for you! You start with an idea, write it in the center of the paper and draw a circle around it. Then draw spokes off the center for each concept/ tool/area of the process. Draw circles around those. Then get more granular with each of those items, drawing spokes with elements. You'll end up with a paper full of circled text and connecting lines. Take a picture of the mind map and upload it to ChatGPT and ask it to transcribe it with subheadings, then you'll have a linear list to work with.
- Filling in a template: If you're a linear thinker, you might like creating a template with the components of an SOP and just running right down the list, filling it out.

No one way of creating an SOP is the right way. The right way is the way you can get it done.

The SOP Process in 1-2-3

I call this the TL;DR version of SOP making:

1. Get everything out of your head: Document all the steps and details involved in your processes.
2. Organize the information: Organize the information.
3. Use and refine: Implement the SOPs and refine them over time as you receive feedback and as

processes evolve.

And, remember, the best kind of SOP is an SOP you'll use. **GT**

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