

Sample Standard Operating Procedure (SOP)

For a Route Driver

Before you leave the shop...

1. Ensure the van is stocked up (especially after reviewing which customers you'll visit)
2. Have your marketing stickers, catalogs and other basics ready
3. Make sure you have your mask, hardhat, hi-vis, safety glasses and proper footwear
4. Pack the following into your clipboard:
 - a. Cabinet cheat sheet and this SOP
 - b. Pen
 - c. Notepad
 - d. Sharpie
 - e. Business cards

When you arrive at the customer location....

1. Back into a parking space away from the front doors
2. Carry your clipboard into the customer
3. Check the notes in Asana which will tell you important details such as whether or not you need to check in with someone and product details (no tablets, etc.)
4. Go through each cabinet checking for expired items, low stock items and items that are so old that they don't stick (like bandages) or work anymore
5. Create the invoice as you go. Record in Zoho.
 - replace cabinets that are unserviceable
6. Arrange cabinet according to the standard fill reference card (laminated picture of cabinet shelves). Ensure you don't stuff/overfill the cabinet.
7. Use the ANSI standard as a guide for a minimum fill.
8. Record all expiration dates on the back of the service record card
9. Record name and date on the service record card
10. Take pictures of the service record card and cabinet. Attach them to account in Zoho.
11. Clean the FA cabinet and AED cabinet with disinfectant spray and a scouring pad or paper towels
12. Ensure the FA cabinets have a Twilight sticker, ANSI sticker and Laerdal sticker (if

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applicable)

13. Check dates on AED pads and batteries. Record the dates in Zoho
14. Check dates on eye wash. Record the dates in Zoho
15. Schedule the next visit as an event in Zoho
16. Get a signature from the point of contact and confirm the best email (usually the accounts payable person)
17. Email the invoice to the customer

When you return to the shop for the day....

1. Repack the van and all related supplies
2. Inform your supervisor of any special orders, customer issues, etc..
3. Plan your route for the next day

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