

SOP Development

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Crafting Effective Standard Operating Procedures (SOPs)

RFP/RFQ Process Overhaul @ [Bull Stockwell Allen](#)

- **Proposal Development:** Collaborated with design teams to streamline the proposal curation process. This overhaul resulted in doubling the project win rate by ensuring proposals were clear, compelling, and consistently high quality.
- **Key Improvements:** Implemented a standardized template for RFP/RFQ responses, incorporated checklists to ensure all requirements were met, and created a timeline for submission deadlines. This reduced errors and improved efficiency.

Onboarding Process @ [Laurel AI](#) and [Bull Stockwell Allen](#)

Laurel AI:

- **Streamlined Onboarding:** Developed an onboarding process that reduced time-to-ramp by 50% and increased new hire satisfaction by 30%.
- **Key Elements:** Created detailed onboarding checklists, standardized training modules, and personalized onboarding plans for each new hire. Included regular check-ins to ensure new hires felt supported.

Bull Stockwell Allen:

- **Enhanced Orientation:** Revamped the onboarding process to ensure new employees were quickly integrated into the company culture and operations.
- **Key Features:** Implemented an onboarding schedule that included company history, core values, and departmental overviews. Created a buddy system to pair new hires with experienced employees for guidance.

Sales, Development, and Customer Success @ [Optimize IS](#)

(Currently in progress:)

As part of what we called The Optimize Method (TOM) Project, we set out to do the following:

- **Objective:** Establish a framework for project execution and client interactions that ensures consistency, predictability, and high quality across all client engagements.
- **Purpose:** Replicable and scalable practices that every team member follows foster a culture of excellence and consistency, streamline internal operations, and solidify their reputation as the #1 Airtable Service Partner.
- **Why this Matters:** Consistency, scalability, and quality ensure the same level of care and expertise, regardless of project complexity or size, empowering team members and enhancing job satisfaction.

Key SOPs were developed as part of this project for the main departments within the organization:

Sales Process:

- **Comprehensive SOPs:** Detailed steps from initial contact to closing the deal.
- **Templates and Scripts:** Consistent and effective customer interactions.
- **DRIs and Hand-offs:** Clearly identified responsible individuals for each step, ensuring smooth transitions.

Development Process:

- **Resources for AMs and Developers:** Agendas and meeting guidelines created for running different types of client meetings at various project stages, as well as email scripts and templates for consistent and effective follow up and communication.
- **Clear Hand-offs:** Ensured smooth hand-offs between responsible individuals and teams throughout the client journey.

Customer Success Process:

- **Onboarding and Support:** SOPs for customer onboarding, product training, and regular check-ins.
- **Feedback Loops (CSAT and NPS):** Processes for collecting and utilizing customer feedback.
- **DRIs and Hand-offs:** Emphasis on seamless transitions and clear responsibilities.