STANDARD OPERATING PROCEDURE TEMPLATE

[Agency Name]
[SOP Title]
[Document Number]
[Version]
[Creation Date]
[Last Updated]

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1. Purpose and Scope

Purpose

[Explain why this SOP exists and its importance to agency operations.]

Example:
This SOP establishes standardized guidelines for our client onboarding process to ensure consistent quality, clear communication, and efficient project initiation across all client engagements.

Scope

[Define what this procedure covers and any limitations.]

Example:
This procedure covers all activities from contract signing to the project kickoff meeting. It applies to all new client relationships but does not include pre-sales activities or project execution processes.

2. Roles and Responsibilities

[Create a table outlining who does what in this process.]

Example:

ROLE	***RESPONSIBILITIES***
Account Manager	• *Acts as primary client contact* • *Sends welcome materials* • *Schedules initial meetings* • *Ensures onboarding questionnaire completion*
Project Manager	• *Creates project timeline* • *Sets up project in management software* • *Prepares kickoff materials* • *Conducts internal and client kickoff meetings*
Creative Director	• *Reviews client brief* • *Assigns creative team members* • *Provides initial creative direction* • *Participates in kickoff meeting*
Admin Coordinator	• *Sets up a client in the billing system* • *Creates shared folders and access permissions* • *Sends a welcome kit* • *Manages documentation*

3. Procedure Details

Prerequisites

[List any conditions that must be met before beginning.]

Example:

- *Signed contract received*
- *Initial payment processed (if applicable)*
- *The sales team has completed the handoff meeting*

Required Tools and Resources

[List software, templates, and materials needed]

Example:

- *Client onboarding questionnaire*
- *Welcome email template*
- *Agency introduction deck*
- *Project management software (Asana)*
- *Communication platform (Slack)*
- *File sharing system (Google Drive)*

4. Exceptions and Special Cases

[Describe how to handle common variations or issues]

Example:

- ***Rush Projects:*** *For urgent timelines, compress steps 1-3 to complete within 48 hours with Department Head approval.*
- ***Enterprise Clients:*** *Include Executive Creative Director in kickoff and add security review with IT during Step 1.*
- ***Multiple Projects:*** *Assign separate Project Managers but coordinate kickoff meetings to avoid duplication.*
- ***International Clients:*** *Adjust meeting schedules for time zones and cultural considerations.*

5. Quality Control Measures

[Detail how quality is measured and maintained.]

Example:

- *Account Manager surveys client 2 weeks after project kickoff (target satisfaction: ≥4.5/5)*
- *Weekly review of onboarding metrics by the Operations team*
- *Key metrics:*
    - *Time from contract to kickoff meeting (target: ≤10 business days)*
    - *Percentage of onboarding steps completed on schedule (target: ≥90%)*
    - *Client satisfaction with the onboarding process (target: ≥4.5/5)*

6. References and Resources

[List related documents and helpful materials.]

Example:

- *Client Onboarding Checklist (Forms/Checklists/OnboardingChecklist.pdf)*
- *Welcome Email Templates (Templates/Email/Welcome)*
- *Agency Service Overview (Marketing/AgencyServices.pdf)*
- *Project Manager's Guide to Kickoff Meetings (Training/PM/KickoffGuide.pdf)*

7. Revision History

Version	Date	Description of Changes	Author
1.0	[MM/DD/YYYY]	Initial document creation	[Name]
[X.X]	[MM/DD/YYYY]	[Brief description of changes]	[Name]

8. Approvals

Name	Position	Signature	Date
[Name]	[Position]	________________	[MM/DD/YYYY]
[Name]	[Position]	________________	[MM/DD/YYYY]

Usage Notes:

- *Complete each section with specific details relevant to your agency process.*
- *Use clear, direct language and avoid jargon.*
- *Include specific timeframes and deadlines for each step.*
- *Assign clear ownership for each task.*
- *Add quality checks after each major step.*
- *Update the SOP at least every 6 months to reflect process improvements.*
- *Train all team members on this SOP before they participate in the process.*
- *Store this document in an easily accessible location for quick reference.*

More Useful Resources:

- [Free Logo Design Questionnaire Template [Docs / DOCX]]
- [2025 Guide to a Seamless Project Intake Process for Creative Teams]
- [How to Keep Track of Invoices Like a Pro [Creative Agency Guide]]