STANDARD OPERATING PROCEDURE TEMPLATE

[Agency Name]
[SOP Title]
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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:
 - o 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]

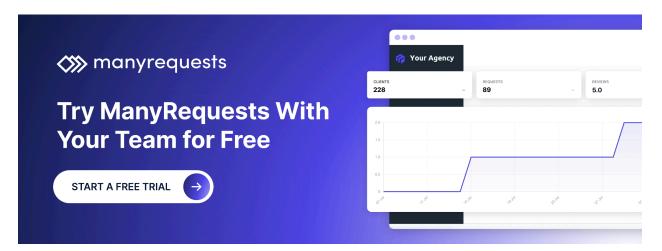


8. Approvals

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]