

Standard Operating Procedure

Blank one-page form

One page. Five fields. Actually gets used.

Process name

Owner

Last reviewed

TRIGGER

What starts this process

STEPS

Numbered, in the order they actually happen

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

TOOLS & LINKS

Where the work happens -- be specific

CHECK

How and how often someone confirms it ran

EXCEPTIONS (optional)

Add once the process has run a few times

REVIEW LOG

One line every time this SOP is checked or updated

Date	Reviewed by	Changes made

Example: New Client Onboarding

Filled in, start to finish

One page. Five fields. Actually gets used.

Page 2 of 2 - Example

Process name: New client onboarding

Owner: Operations lead

Backup: Founder

TRIGGER

Contract is signed and the deposit invoice is paid.

STEPS

1. Create the client folder in the shared drive (ClientName_YYYY).
2. Send the welcome email (template: Onboarding > Welcome) within 1 business day.
3. Add the client to the project tool with the onboarding board template.
4. Schedule the kickoff call within 5 business days; attach the intake form.
5. Run the kickoff call using the intake form as the agenda.
6. Set up billing with the agreed schedule and payment method.
7. Assign the account to its day-to-day owner; tag them on the board.
8. Send the "what to expect in week one" email 48 hours after kickoff.
9. Log onboarding complete in the CRM; set a 30-day check-in reminder.

TOOLS & LINKS

Shared drive (Clients folder), email templates, project board, invoicing tool, CRM.

CHECK

"Onboarding: Complete" in the CRM within 10 business days, reviewed weekly at the Monday ops check-in.

EXCEPTIONS

Client pays by wire instead of card: skip step 6, invoice manually and flag finance.

Client requests an expedited kickoff: compress step 4 to 2 business days, notify the owner directly.