109 SOPs

that Every Team Needs

PROCESSDRIVEN

Intro:

Congratulations on taking a big step toward building a strong foundation of processes for your business! Inside this resource, you'll find a series of standard operating procedures (SOP) topics that will help guide your systemization journey.

WHAT IS AN SOP?

Great question! SOPs are detailed instructions to guide the reader toward achieving a specific result. Like recipes in a cookbook, SOPs are typically titled based on the end result they're providing. For example, your SOP for "How to Invoice a Client" would outline all the steps -- big and small! -- you'd need to complete in order to send an invoice.

WHY DO TEAMS CREATE SOPS?

SOPs are one of easiest ways to start systemizing team operations because they're easy to create, search through, and update. When any organization is looking to document institutional knowledge (and get it out of human brains for safe-keeping!) SOPs are the go-to option.

WHAT DOES THIS RESOURCE PROVIDE?

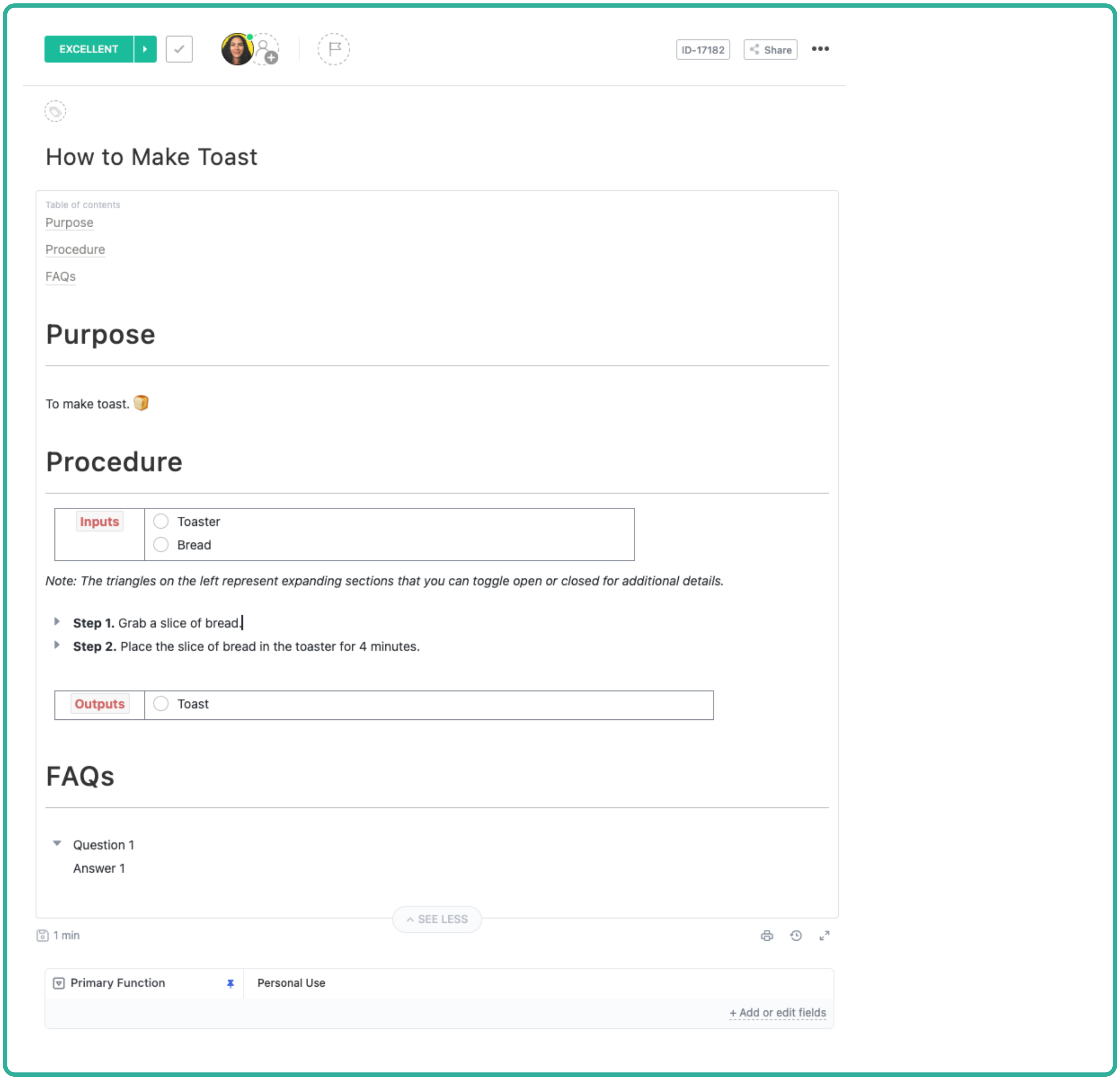
This SOP freebie is intended to help you start thinking about which SOPs you need in your business in order to systemize your operations and ultimately, grow the business. We've curated a list of 109 common SOP topics found in various industries by business function.

> Please note that we're providing SOP topics and not pre-written SOPs -- that's intentional! The content of standard operating procedures will be completely unique to your teams' processes, technology, and people. Your SOPs need to reflect *your* reality, not ours!

Intro:

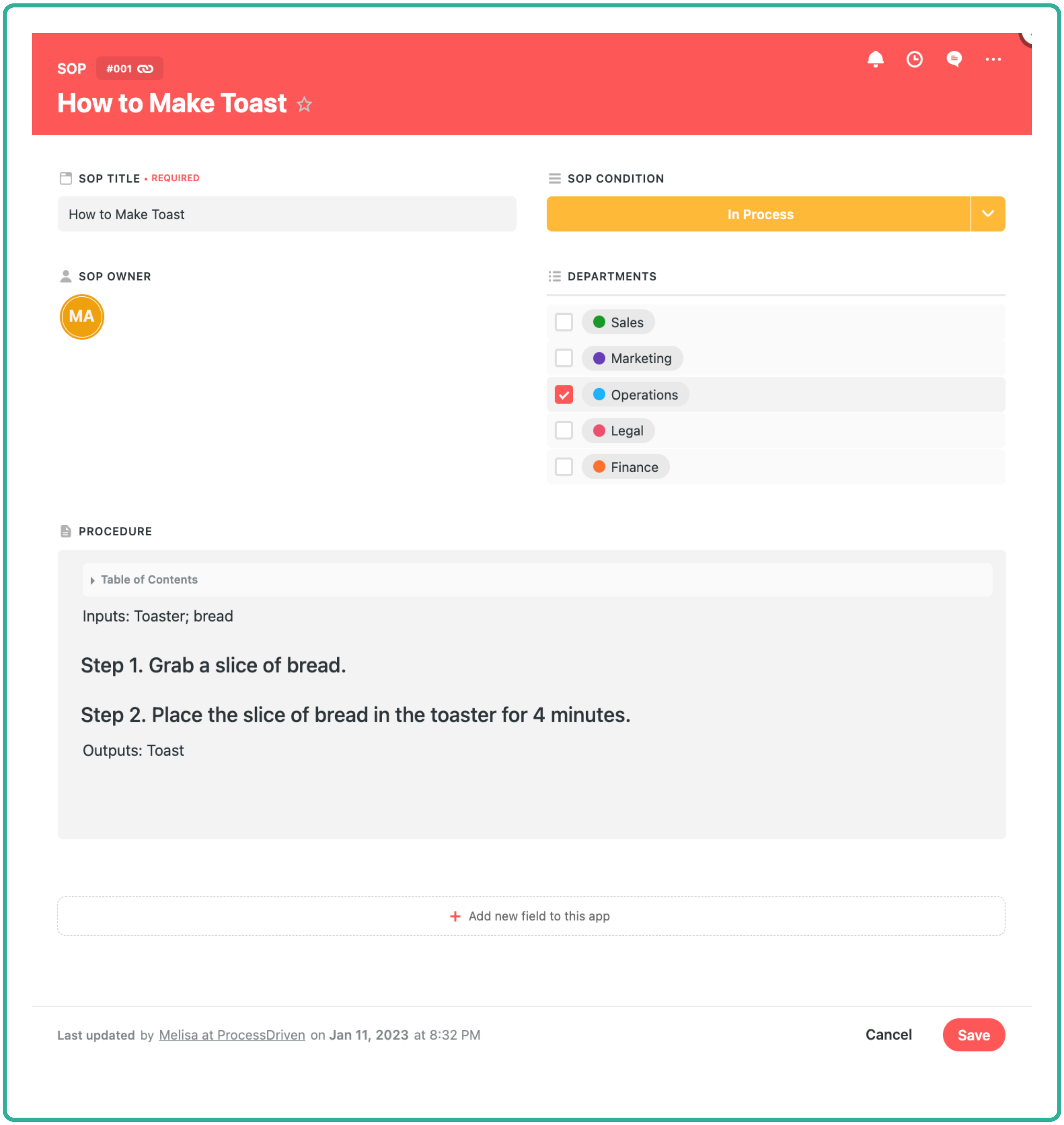
From the guidelines we provide, you can structure your SOP by creating new records within your work management or process software of choice.

EXAMPLE OF AN SOP IN CLICKUP:



Intro:

EXAMPLE OF AN SOP IN SMARTSUITE:



Intro:

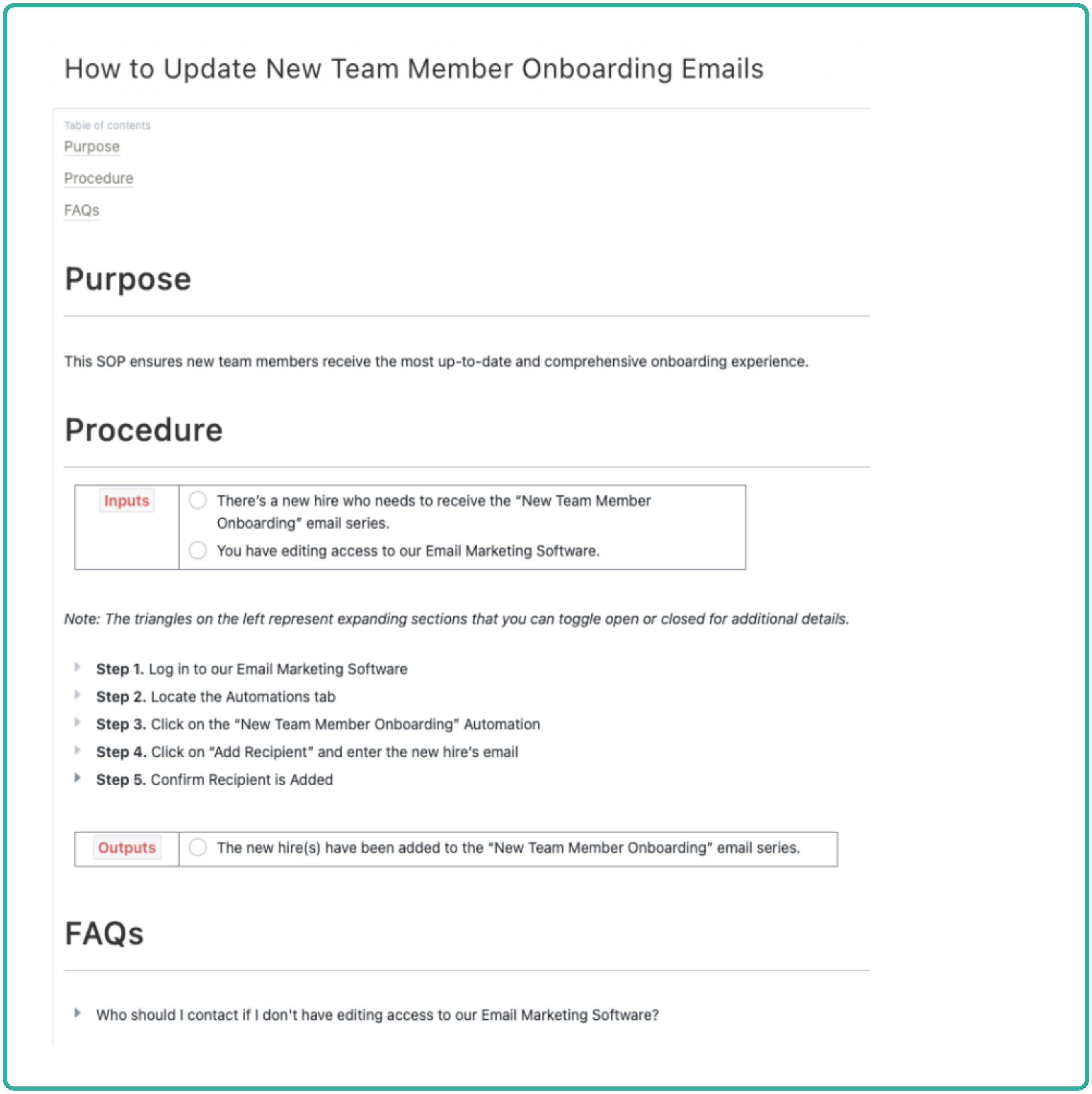
WHAT SHOULD MY SOP LOOK LIKE?

SOP structure can be as simple or complex as you prefer. At ProcessDriven, we recommend you keep it simple by including just three sections in your SOPs:

- Purpose *use this section to define why this process matters*
- Procedure *use this section to provide your "recipe" and, if you want to be an overachiever, your Inputs and Outputs*
- FAQs *outline any common roadblocks or issues that aren't covered in the above sections*

Intro:

Need an example of what that might look like? Check out this resource where we're keeping it simple and utilizing Toggles to provide space for screenshots or greater details if we so choose.



How to Update New Team Member Onboarding Emails

Table of contents

Purpose

This SOP ensures new team members receive the most up-to-date and comprehensive onboarding experience.

Procedure

Inputs	◯ There's a new hire who needs to receive the "New Team Member Onboarding" email series. ◯ You have editing access to our Email Marketing Software.

Note: The triangles on the left represent expanding sections that you can toggle open or closed for additional details.

- **Step 1.** Log in to our Email Marketing Software
- **Step 2.** Locate the Automations tab
- **Step 3.** Click on the "New Team Member Onboarding" Automation
- **Step 4.** Click on "Add Recipient" and enter the new hire's email
- **Step 5.** Confirm Recipient is Added

Outputs	◯ The new hire(s) have been added to the "New Team Member Onboarding" email series.

FAQs

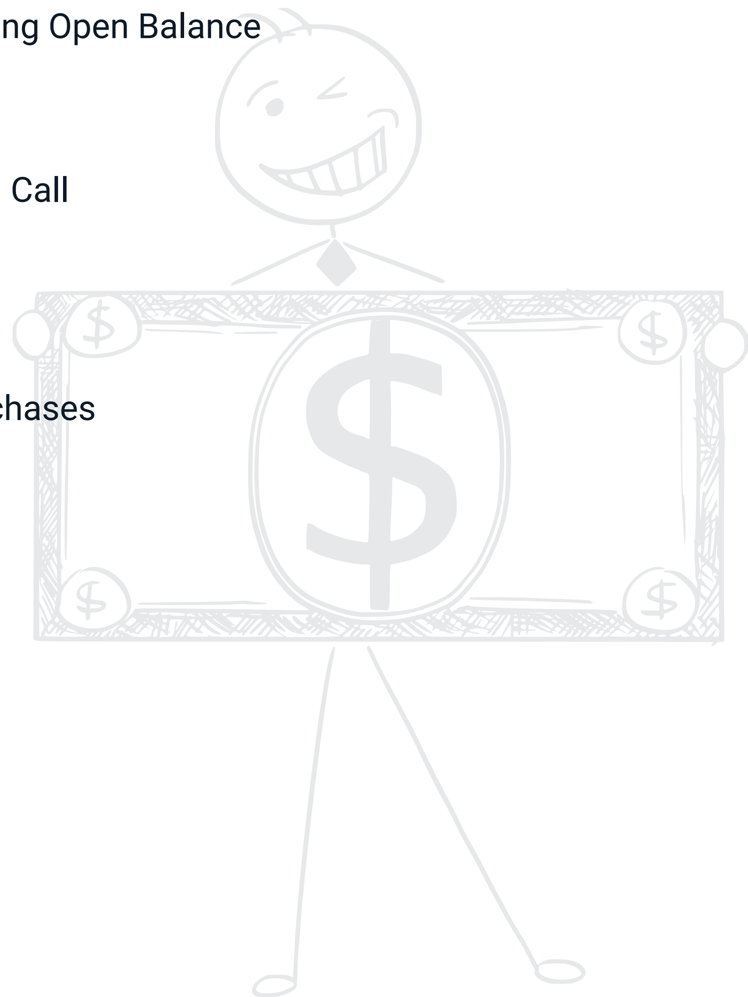
- Who should I contact if I don't have editing access to our Email Marketing Software?

Marketing:

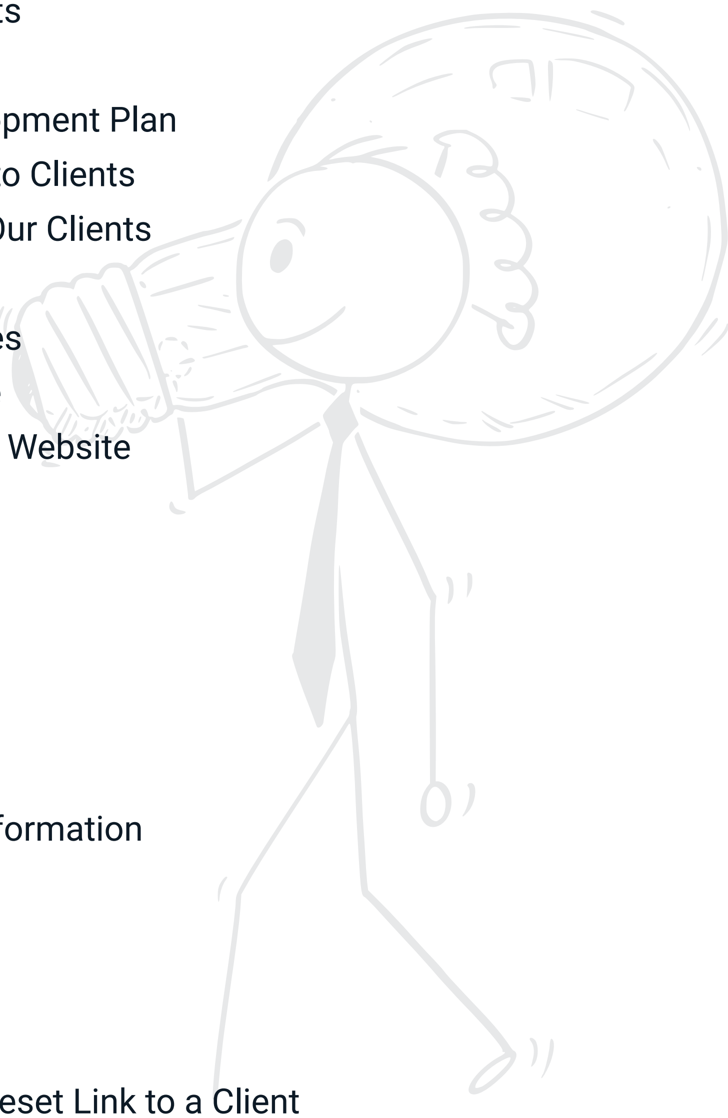
- [ ] How to Draft a Newsletter
- [ ] How to Schedule a Newsletter
- [ ] How to Upload Subtitles for a YouTube Video
- [ ] How to Manually Create Social Media Posts
- [ ] How to Draft a Blog Post
- [ ] How to Proofread a Blog Post
- [ ] How to Schedule a YouTube Video
- [ ] How to Select Which Ideas to Turn Into Content
- [ ] How to Collect Ideas/Feedback from our Audience
- [ ] How to Design a Thumbnail
- [ ] How to Pitch Services/Offerings in a Facebook Group
- [ ] How to Respond to Facebook Questions in the Facebook Group
- [ ] How to Accept New Members in the Facebook Group
- [ ] How to Welcome New Members in the Facebook Group
- [ ] How to Collect Testimonials From Our Public Audience
- [ ] How to Book Speaking Gigs/Podcast Appearances
- [ ] How to Audit an Opt-in/Freebie
- [ ] How to Review Content Before it Gets Published
- [ ] How to Create an Email Automation
- [ ] How to Complete Quarterly Competitor Research
- [ ] How to Respond to YouTube Comments
- [ ] How to Respond to Sponsorship Requests
- [ ] How to Respond to Requests for Discounts
- [ ] How to Schedule a Livestream
- [ ] How to Reply to Social Media Messages
- [ ] How to A/B Test with our Newsletter
- [ ] How to Schedule Social Media Posts

Sales:

- [ ] How to Answer a Prospect Inquiry (by Phone)
- [ ] How to Answer a Prospect Inquiry (in Writing)
- [ ] How to Create a Discount Code/Coupon
- [ ] How to Send an Invoice for Remaining Open Balance
- [ ] How to Generate an Extra Receipt
- [ ] How to Adjust Product Pricing
- [ ] How to Deliver a Sales Consultation Call
- [ ] How to Negotiate Contracts
- [ ] How to Plan a Sales Campaign
- [ ] How to Manually Payout Affiliates
- [ ] How to Invoice Clients for Bulk Purchases
- [ ] How to Draft a Scope of Work
- [ ] How to Follow Up with Prospects
- [ ] How to Create an Affiliate



Fulfillment:



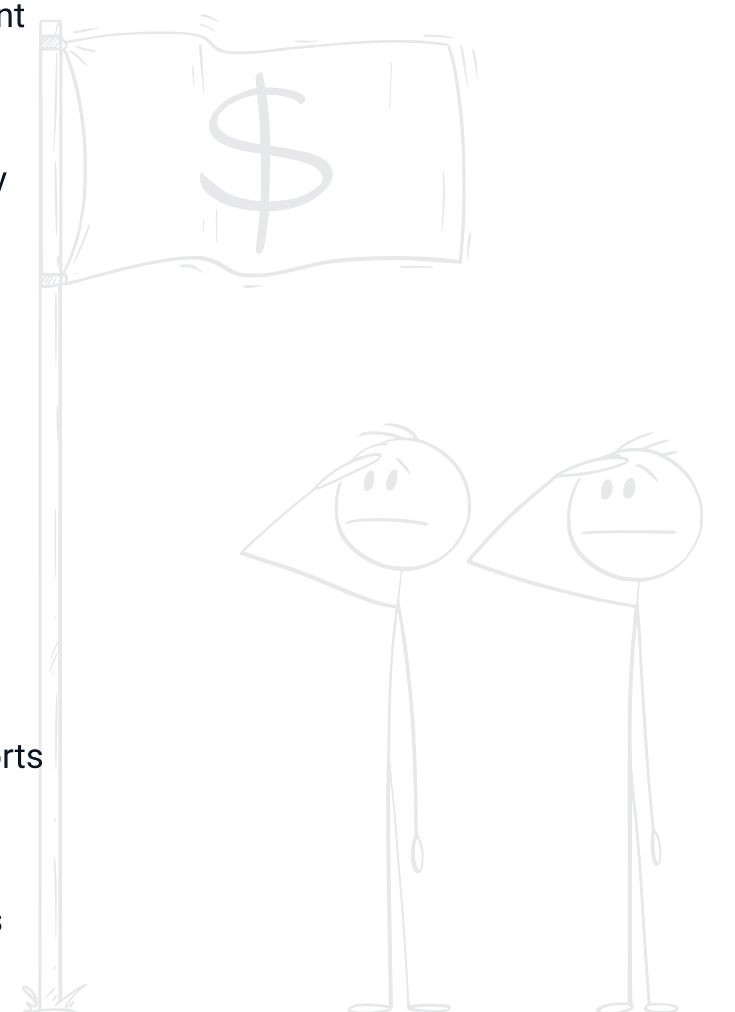
- [ ] How to Pick an Order
- [ ] How to Ship Daily Orders
- [ ] How to Collect Feedback From Clients
- [ ] How to Sort Feedback From Clients
- [ ] How to Create a New Product Development Plan
- [ ] How to Edit Automated Emails Sent to Clients
- [ ] How to Request Testimonials From Our Clients
- [ ] How to Process a Refund
- [ ] How to Handle Chargebacks/Disputes
- [ ] How to Add a Product to the Website
- [ ] How to Edit/Update a Product on the Website
- [ ] How to Process Customer Payments
- [ ] How to Ship an Order to a Customer
- [ ] How to Check Inventory
- [ ] How to Restock Inventory
- [ ] How to Receive Inventory
- [ ] How to Inspect Inventory
- [ ] How to Change/Update Customer Information
- [ ] How to Handle Email Changes
- [ ] How to Confirm Client Cancellation
- [ ] How to Reschedule Client Sessions
- [ ] How to Reply to a Support Ticket
- [ ] How to Manually Send a Password Reset Link to a Client

Operations:

- [ ] How to Track Your Time
- [ ] How to Find & Prioritize Your Tasks
- [ ] How to Create an SOP
- [ ] How to Contribute Ideas for Improving the Business
- [ ] How to Track Key Metrics Each Week
- [ ] How to Save and Name Downloaded Files
- [ ] How to Submit Time Off Requests
- [ ] How to Approve Time Off Requests
- [ ] How to Create Redirection Links
- [ ] How to Onboard a New Employee
- [ ] How to Develop Internal Policies
- [ ] How to Offboard a New Employee
- [ ] How to Onboard a New Contractor
- [ ] How to Host Team Meetings
- [ ] How to Plan Team Retreats
- [ ] How to Send Welcome Gifts to New Employees
- [ ] How to Send Anniversary Gifts to Employees
- [ ] How to Keep Your Company Devices Secure
- [ ] How to Handle Employee Complaints
- [ ] How to Update the Employee Handbook
- [ ] How to Create and Post a Job Listing
- [ ] How to Vet Job Applications
- [ ] How to Schedule Interviews
- [ ] How to File a Written Complaint
- [ ] How to Provide Feedback During Employee Role Reviews
- [ ] How to Give an Employee a Raise
- [ ] How to Offboard An Employee
- [ ] How to Hire and Onboard an Employee
- [ ] How to Hire and Onboard a Contractor

Legal:

- [ ] How to Send a Cease and Desist Letter
- [ ] How to Resolve Customer Violating Terms & Conditions
- [ ] How to Send a Non-Disclosure Agreement
- [ ] How to Cite Our Terms & Conditions
- [ ] How to Search for Potential Copycats
- [ ] How (and When) to Contact Our Attorney



Finance:

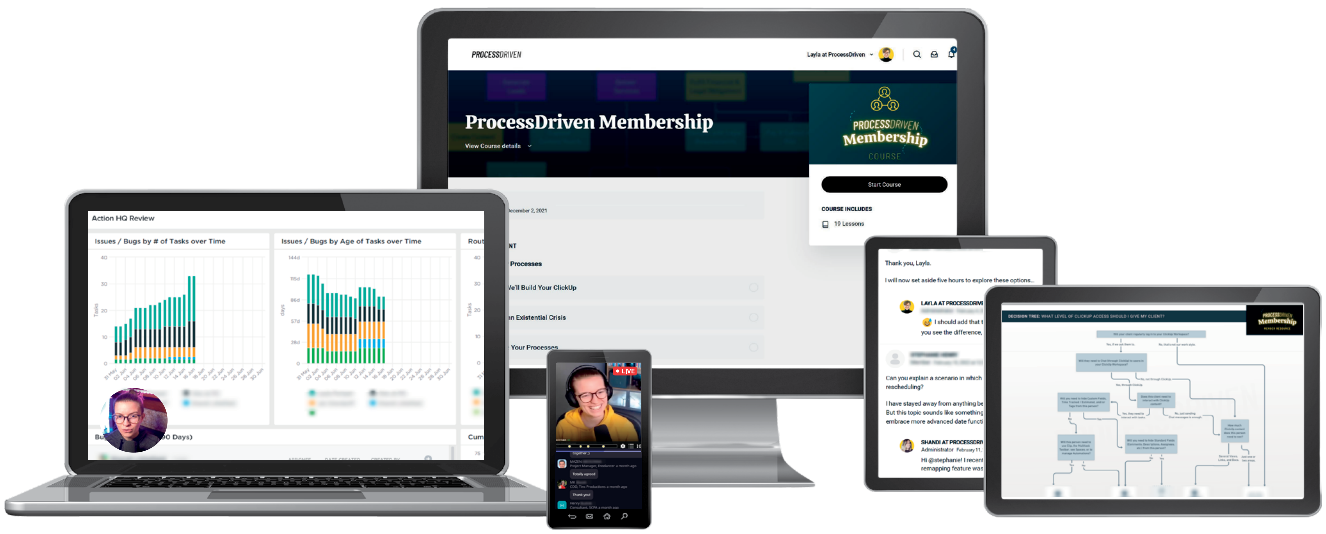
- [ ] How to Pay Quarterly Estimated Taxes
- [ ] How to Create Annual Budget
- [ ] How to Monitor Incoming Sales
- [ ] How to Prepare Quarterly Financial Reports
- [ ] How to Run Payroll
- [ ] How to Prepare to File Our Annual Taxes
- [ ] How to Post Transactions in Quickbooks
- [ ] How to Reconcile our Quickbooks
- [ ] How to Bookkeep a Chargeback
- [ ] How to Bookkeep Owner's Compensation

Ready?

READY TO SYSTEMIZE THE EASY WAY? LET'S WORK TOGETHER!

SOPs are just one piece of the larger puzzle of systemizing your operations -- don't do it the hard way! We've guided 1,200 busy leaders like you through building a foundation of business processes, and we'd love to work with you, too!

For more information on how we can help, Click Here.



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