



FREE DOWNLOAD

The Small Agency SOP Starter Kit

Five copy-and-fill standard operating procedure templates to get your agency out of one person's head and onto paper. Print them, drop them in Notion, or paste them into your docs and start filling.

01	How to use this kit	Anatomy + naming
02	Blank master SOP template	Fill-in-the-blanks
03	Client onboarding (web design)	Ready to use
04	Pre-launch website QA checklist	Ready to use
05	Employee first-day setup	Ready to use
06	Client complaint handling	Ready to use

By Gaurav Tiwari, CEO of Gatilab. Built from the SOPs that keep a real agency running.

START HERE

How to use this kit

A standard operating procedure is a written document that explains exactly how to complete a recurring task. Detailed enough that someone who has never done it can, by following the steps.

EVERY SOP NEEDS THESE SIX PARTS

1 A clear trigger

What kicks it off, every time.

2 Action-verb steps

One action each: Send, Create, Confirm.

3 Linked templates

No hunting for the doc mid-task.

4 A named owner

A specific person, never "the team."

5 Who and when

"Within 48 hours," not "soon."

6 A defined "done"

The clear end state, spelled out.

NAME EVERY SOP THE SAME WAY

SOP - [Category] - [Process Name]

SOP - Client - Onboarding · SOP - HR - New Employee First Week · SOP - QA - Website Launch Checklist

THE THREE-WEEK ROLLOUT

- 1 Week 1–2.** Every time you do a recurring task, write down your steps right after. Rough is fine.
- 2 Week 3.** Pick the processes that cause the most pain when done inconsistently. Polish those first into the template on the next page.
- 3 Week 4.** Hand each SOP to someone who has never done the task. Watch where they get stuck. Their confusion is your missing detail.

One rule that saves you. Document the repeatable risk first, not the prettiest dashboard. Start with client onboarding, QA, and invoicing. You can build the rest over time.

CATEGORY
.....OWNER
.....LAST UPDATED
.....**— TRIGGER — WHAT STARTS THIS PROCESS?**When...
.....**— STEPS — ONE ACTION EACH, START WITH A VERB**

- 1
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- 2
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- 3
.....
- 4
.....
- 5
.....
- 6
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- 7
.....

— LINKS & REFERENCES — TEMPLATES, TOOLS, DOCS

.....
.....

— COMPLETE WHEN — THE CLEAR END STATE

.....

— CHANGELOG

.....
.....

— TRIGGER

Contract signed and deposit received.

— STEPS

- 1 **Welcome email** (within 2 hours of deposit). Send using template [\[link\]](#). Include kickoff scheduling link and onboarding questionnaire. CC the assigned designer and account manager.
- 2 **Create project infrastructure** (within 24 hours). Set up the project in your PM tool, create the client folder from template [\[link\]](#), add the client as a guest, open a #client-name channel.
- 3 **Review questionnaire** (within 48 hours of receipt). Flag unclear answers for the kickoff and share relevant responses with the design team.
- 4 **Kickoff call** (within 5 business days of contract). Use the agenda template [\[link\]](#), record with permission, send action items within 24 hours.
- 5 **Project timeline**. Build it in the PM tool, share with the client, confirm understanding in writing.

— COMPLETE WHEN

Client confirms the timeline in writing.

— TRIGGER

Site is built and staged, before you show or hand off to the client.

FUNCTIONALITY

- ☐ All links work (crawl or manual)
- ☐ Forms submit + notifications fire
- ☐ Search works (if applicable)
- ☐ Cart + checkout work (if applicable)
- ☐ 404 page displays correctly
- ☐ Old-URL redirects work (migrations)

CROSS-BROWSER & DEVICE

- ☐ Chrome, Firefox, Safari, Edge (latest)
- ☐ Desktop 1920px+ / laptop 1366px
- ☐ Tablet landscape + portrait
- ☐ Mobile 375px

PERFORMANCE & SEO

- ☐ PageSpeed: desktop 90+ / mobile 80+
- ☐ Images optimized + lazy-loaded
- ☐ No console errors
- ☐ Compression (GZIP/Brotli) on
- ☐ Unique title tags + meta descriptions
- ☐ One H1 per page + image alt text
- ☐ XML sitemap generated
- ☐ Robots.txt configured

SECURITY & LEGAL

- ☐ SSL installed
- ☐ Spam protection on forms
- ☐ Strong admin credentials
- ☐ Backups configured
- ☐ Privacy policy published
- ☐ Cookie consent (if required)

— COMPLETE WHEN

Developer and project manager both sign off, with the date.

— TRIGGER

Offer accepted and start date confirmed.

BEFORE THE START DATE

- | | |
|--|---|
| ☐ Create email account | ☐ Prepare hardware (if applicable) |
| ☐ Invite to Slack + PM tool | ☐ Send first-day logistics email |

DAY ONE – MORNING

- 1 Greet and office/team tour (15 min).
- 2 Workstation setup verification (30 min).
- 3 Confirm tool access: email, Slack, PM tool, time tracking, cloud storage.
- 4 HR paperwork + company overview (deck [\[link\]](#)).

DAY ONE – AFTERNOON

- 5 Team introductions + assigned buddy and lunch.
- 6 Role-specific tool training begins.
- 7 End-of-day check-in with manager.

WEEK-ONE GOALS

- | | |
|---|--|
| ☐ Complete all tool training modules | ☐ Complete first small task |
| ☐ Shadow two client calls | ☐ Daily 15-min manager check-in |

— COMPLETE WHEN

Onboarding checklist signed off and the new hire submits a Friday feedback form.

— TRIGGER

A client expresses dissatisfaction by any channel. Match the tier, then act.

Tier 1 · Minor dissatisfaction

Respond within 4 hrs

- Handler: Account Manager
- Acknowledge the concern, explain the situation if relevant
- Offer a solution (expedited revision, future accommodation)
- Document in client notes

Tier 2 · Significant issue

Respond within 2 hrs

- Handler: Account Manager + Project Lead
- Immediate acknowledgment call, not just email
- Find the root cause internally before proposing fixes
- Propose concrete remediation + schedule a follow-up
- Document fully and debrief in the next team meeting

Tier 3 · Relationship-threatening

Respond within 1 hr

- Handler: Agency Owner / Director
- Owner-to-owner call, genuine apology, no over-blaming
- Concrete plan with a timeline; consider a goodwill gesture
- Internal post-mortem + a process improvement

— ESCALATE A TIER WHEN

The client says "unacceptable" or "considering other options," CCs their boss, threatens to cancel, or raises the same issue more than twice without resolution.