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**SOP MASTER- Strategy Calls- Systems Vault**

**PREREQUISITES**

[SOP- Strategy Sessions with New Clients- Systems Vault](https://docs.google.com/document/d/160K3uvsVIUIa9FJm9G-sN1d_FZ0IyLLiJzdwW1PPQDc/edit?usp=sharing)

[SOP- Strategy Sessions with Existing Clients- Systems Vault](https://docs.google.com/document/d/1OVDiYp6PIxfD2o0jaEK0trR8XLB45XDv5-_UeStPtPo/edit?usp=sharing)

[SOP- Creating a Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1OJ-90jyOn2GfDwOWTamdO48V9TuAjE3AH-veXHYq40A/edit?usp=sharing)

[Template: Breakthrough Strat Call Action Plan Example- Systems Vault](https://docs.google.com/document/d/1-_aNXWCCya47PB_7dHVz_xBPyr6SV9kuA6oPevAQQzA/edit?usp=sharing)

**PURPOSE**

Strategy Calls play an important role in how we obtain all the information needed to successfully work with our clients. Strategy Calls are an opportunity to get on the same page, set the right expectations and carry out projects to the best of our ability.

We offer strategy calls to to:

1. Existing Clients: We hold monthly strategy calls (or more depending on the retainer size) with clients to ensure that we stay on the same page and provide monthly opportunities for strategy and brainstorming with each client.
2. New Clients: We offer strategy calls as a one-off service (we call these Breakthrough Strategy Sessions and Getting Down to Business sessions, respectively, for new clients who are not set up for ongoing retainer services and for clients who are set up to start ongoing retainer services.

**PARTY**

OBMs

**PROPERTY**

Agency Manager / Lead OBM

**PROCESS**

Part 1: Strategy Calls with Existing Clients

Part 2: Strategy Calls with New Clients

Part 3: Creating Monthly Action Plans

**PROCEDURE**

**Part 1: Strategy Calls with Existing Clients**

See: [SOP- Strategy Calls with New Clients- Systems Vault](https://docs.google.com/document/d/160K3uvsVIUIa9FJm9G-sN1d_FZ0IyLLiJzdwW1PPQDc/edit?usp=sharing)

**Part 2: Strategy Calls with New Clients**

See: [SOP- Strategy Calls with Existing Clients- Systems Vault](https://docs.google.com/document/d/1OVDiYp6PIxfD2o0jaEK0trR8XLB45XDv5-_UeStPtPo/edit?usp=sharing)

**Part 3: Creating Monthly Action Plans**

See: [SOP- Creating a Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1OJ-90jyOn2GfDwOWTamdO48V9TuAjE3AH-veXHYq40A/edit?usp=sharing)

**Created by:**

**Department:** Delivery

**Date:**

**Revised:**

**Revised by:**