Note: This document is “view only”. Please create a copy of this document and save it to your drive.

**SOP- Creating Templates & Supporting Docs- Systems Vault**

**PREREQUISITE**

[Master: SOP- Standard Operating Procedures- Systems Vault](https://docs.google.com/document/u/0/d/1P8URSBV8z47y77ZGJGUbzm-qVnItlp-NJmbVZygxfIM/edit)

Google Drive

SN Guidelines: Brand Voice

[Master: Guidelines- Naming Conventions- Systems Vault](https://docs.google.com/document/u/0/d/1IsYwJoykfoADN6hC3jGEgms5vz92vpVEAHWlxIMMJW8/edit)

[Teamwork PM](http://sarahnoked.com/teamwork)

**PURPOSE**

We create templates and supporting docs (email, contracts, graphics, etc) for all recurring tasks and business activities to save time and streamline how we reply or respond.

**POLICY**

In each SOP folder:

1. [OPERATIONS & SUPPORT (SOPs)- Systems Vault](https://drive.google.com/open?id=1p4iQ3rWYJMiLJd0jpxqlClq22Hx5gPC6)- All SOPs that deal supporting the SOPs- like admin and things that go into maintaining the day to day operations
2. [SALES & PRODUCTS (SOPs)- Systems Vault-](https://drive.google.com/open?id=1hCuFqV9VUB7rO-G1xfA8N5d1ruFDCAQo) All SOPs that deal with the selling, launching and creating products
3. [MARKETING (SOPs)- Systems Vault](https://drive.google.com/open?id=1vXtTM6zYbGUCsufFexhDz4xCvS-YaKQ7)- All SOPs that deal with the marketing, advertising and promotion
4. [DELIVERY (SOPs)- Systems Vault](https://drive.google.com/open?id=1Hykfo-iA0aB_8mznWPbiY_C7t127nHsz)- All SOPs that deal with the delivery of our products and services
5. [GROWTH (SOPs)- Systems Vault](https://drive.google.com/open?id=1-ueXx5cWlUUDUA_hvfLl3NJ0_8TzRvwU)- All SOPs the deal with training, onboarding and offboarding team members

There are 2 subfolder that exists:

1. TEMPLATES FOR XXX (SOPs - Internal)- Sarah Noked OBM >>> This is where the templates relating to specific SOPs are saved.
2. SUPPORTING DOCS FOR XXX (SOPs - Internal)- Sarah Noked OBM >>> This is where the supporting docs relating to specific SOPs are saved.

When linking templates and supporting docs to SOPs always use the exact name using [Master: Guidelines- Naming Conventions- Systems Vault](https://docs.google.com/document/u/0/d/1IsYwJoykfoADN6hC3jGEgms5vz92vpVEAHWlxIMMJW8/edit) created for the document within the SOPs.

Guideline for email templates:

* The tone of the email should show enthusiasm for the project you’re working on should sound authentically involved and pleasant.
* There should be a greeting in the beginning of each email and a salutation at the end. Should follow SN Guidelines: Brand Voice

**PARTY**

All Team Members

**PROPERTY**

Online Business Manager

**PROCESS**

Part 1: Create the Template and Save Appropriately

Part 2: Link Document to SOP

**PROCEDURE**

**Part 1: Create the Template and Save Appropriately**

1. Access the Templates folder in Google Drive
2. Click on New > Google Doc > OK to create a document in the shared folder
3. Name the template based on the [Master: Guidelines- Naming Conventions- Systems Vault](https://docs.google.com/document/u/0/d/1IsYwJoykfoADN6hC3jGEgms5vz92vpVEAHWlxIMMJW8/edit) file
4. Write content for email template
5. Include:
   * 1. Title (Same as the Title of the Document)
     2. Subject Line
     3. Greeting
     4. Content
     5. Salutation
     6. Date created/by whom/date revised/by whom

**Part 2: Link Document to SOP**

1. Link Document within the SOP it is connected to both under the Prerequisites section and where relevant within the SOP

**Created by:**

**Department:** Growth

**Date:**

**Revised:**

**Revised by:**