

Standard Operating Procedure (SOP)

Title: MyWork Flow

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1. Purpose

In this SOP I have outlined a relatable process of my workflow to managing tasks, communication, and deliverables for clients. It ensures consistency, quality, and efficiency in service delivery.

2. Scope

This SOP applies to all interactions, task management, and service delivery for various clients. It covers initial onboarding, task execution, communication protocols, and periodic reviews.

3. Responsibilities

- **Virtual Assistant (VA):** Responsible for executing tasks, maintaining communication, and ensuring timely delivery of services.
- **Client:** Responsible for providing clear instructions, timely feedback, and necessary resources for task completion.

4. Procedures

4.1 Client Onboarding

- **Initial Consultation:**
 - Understanding your need, I will review the info provided by the client to ensure I get everything I need to get started. Don't worry, if there is anything else I need, I will get in touch.
 - Client's expectations, and preferred mode of communication.
 - Agree with you on project timelines, deadlines, and expected key deliverables.
- **Documentation:**
 - Create a client profile containing contact details, project scope, and specific requirements.
 - Draft and send a service agreement or contract outlining the terms of service, confidentiality, and payment terms.

4.2 Communication Protocols

- **Regular Updates:**
 - Provide regular updates to the client on task progress, including any challenges or changes in the timeline.

- Use the client's preferred communication channel (email, chat, or project management tools).
- **Meetings:**
 - Schedule periodic meetings (weekly, bi-weekly, or monthly) to review progress, discuss new tasks, and address any concerns.
 - Prepare and share a meeting agenda in advance, and follow up with meeting minutes.
- **Response Time:**
 - Respond to client inquiries and messages as soon as possible within working hours.
 - Establish clear boundaries for communication outside of agreed working hours, if necessary.

4.3 Quality Assurance

- **Review Process:**
 - Review all completed tasks for accuracy, consistency, and adherence to the client's specifications before submission.
 - Perform a final check to ensure that all client feedback has been incorporated.
- **Client Feedback:**
 - Encourage clients to provide feedback on completed tasks.
 - Address any feedback promptly, making revisions as needed to meet client expectations.

4.4 Client Offboarding

- **Project Completion:**
 - Upon project completion or termination of services, provide the client with all necessary documentation and final deliverables.
- **Feedback Request:**
 - Request feedback on the overall experience and service quality.
- **Data Management:**
 - Ensure client data is securely stored or deleted according to the client's preferences and data protection regulations.

5. Tools and Resources

- **Task Management Tools:** Asana, Trello, Monday.com
- **Communication Tools:** Email, Slack, Zoom, Microsoft Teams
- **Document Management:** Google Drive, Dropbox, OneDrive
- **Calendar Management:** Calendly

6. Review and Update

This SOP is being reviewed and updated periodically or as needed to reflect significant changes in procedures, tools, or client needs.