



# STANDARD OPERATING PROCEDURES (SOPS)

---

Workflow Automation Delivery Framework

**ENTERPRISE EDITION**

**Version:** 2.0

**Date:** December 28, 2025

**Author:** Mirza Iqbal

**Contact:** [mirza.iqbal@next8n.com](mailto:mirza.iqbal@next8n.com)

# Table of Contents

---

Table of Contents

Standard Operating Procedures (SOPs)

Master Index for All Team Roles

---

Overview

---

Role Definitions

---

SOP Document Index

---

Handoff Matrix

---

Process Stages

---

Quick Reference: Who Does What

Sales Phase

---

Delivery Phase

---

Support Phase

---

Escalation Paths

---

Communication Standards

Response Times

---

## Documentation Standards

---

---

## Training Path

---

---

# Standard Operating Procedures (SOPs)

---

## Master Index for All Team Roles

---

### Overview

---

This document indexes all Standard Operating Procedures for the Workflow Automation Delivery team. Each role has specific responsibilities and procedures to follow.

---

## Role Definitions



## SOP Document Index

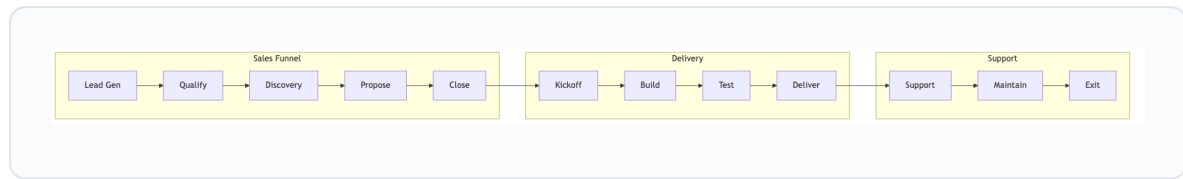
ROLE	DOCUMENT	PURPOSE
Lead Gen VA	01-sop-lead-gen-va.md	Lead sourcing, qualification, outreach
Sales Representative	02-sop-sales-rep.md	Discovery, relationship building
Closer	03-sop-closer.md	Proposals, negotiations, contracts
Project Manager	04-sop-project-manager.md	Coordination, communication, timeline
Technical Lead	05-sop-technical-lead.md	Architecture, oversight, quality
Developer	06-sop-developer.md	Building, testing, documentation
Client	07-sop-client.md	What clients need to do

## Handoff Matrix

### WHO HANDS OFF TO WHOM:

Lead Gen VA	Sales Rep	: Qualified lead with initial info
Sales Rep	Closer	: Warm prospect ready for proposal
Closer	Project Manager	: Signed contract, deposit paid
Project Manager	Technical Lead	: Kickoff complete, requirements gathered
Technical Lead	Developer	: Architecture approved, tasks assigned
Developer	Technical Lead	: Work complete for review
Technical Lead	Project Manager	: QA passed, ready for handover
Project Manager	Client	: Handover call, documentation delivered

## Process Stages



## Quick Reference: Who Does What

### Sales Phase

TASK	PRIMARY OWNER	SUPPORT
Find leads	Lead Gen VA	-
Initial outreach	Lead Gen VA	-
Respond to inquiries	Sales Rep	-
Discovery calls	Sales Rep	Closer
Proposals	Closer	Sales Rep
Negotiations	Closer	-
Contract signing	Closer	-

## Delivery Phase

TASK	PRIMARY OWNER	SUPPORT
Project coordination	Project Manager	-
Client communication	Project Manager	Technical Lead
Technical decisions	Technical Lead	Developer
Building workflows	Developer	Technical Lead
Testing	Developer	Technical Lead
Documentation	Developer	Project Manager
Handover call	Project Manager	Technical Lead

## Support Phase

TASK	PRIMARY OWNER	SUPPORT
Support period	Developer	Project Manager
Retainer work	Developer	Technical Lead
Client check-ins	Project Manager	-
Invoicing	Project Manager	-
Offboarding	Project Manager	Developer



## Escalation Paths

ISSUE TYPE	ESCALATE TO
Sales issues	Closer Sales Manager
Technical blockers	Technical Lead Agency Owner
Client complaints	Project Manager Agency Owner
Payment issues	Project Manager Finance/Owner
Security incidents	Technical Lead Agency Owner Legal
Contract disputes	Agency Owner Legal

## Communication Standards

### Response Times

COMMUNICATION	EXPECTED RESPONSE
Client email (normal)	24 hours
Client email (urgent)	4 hours
Internal Slack	2 hours
Critical issues	30 minutes

### Documentation Standards

All documentation must include:

- Date created/updated
- Author
- Version number
- Clear headings
- Action items highlighted

## Training Path

---

### NEW TEAM MEMBER ONBOARDING:

#### Week 1: Framework Overview

- Read all SOP documents
- Review sample projects
- Shadow experienced team member

#### Week 2: Role-Specific Training

- Deep dive on role SOP
- Practice scenarios
- Tool training

#### Week 3: Supervised Practice

- Handle real tasks with oversight
- Daily check-ins
- Feedback sessions

#### Week 4+: Independent Work

- Full responsibility
- Weekly check-ins
- Ongoing development

---

**Next:** See individual SOP documents for role-specific procedures.

---

Workflow Automation Delivery Framework | next8n | <https://next8n.com>

This document is confidential and intended for authorized use only.