next8n

SOP: PROJECT MANAGER

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Best Practices

SOP: Project Manager

Standard Operating Procedure for Coordination & Client Communication

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Role Overview

Title: Project Manager
Reports To: Agency Owner / Operations Manager
Receives From: Closer
Coordinates With: Technical Lead, Developer
Interfaces With: Client

Primary Objective:
Ensure smooth project delivery through coordination, communication, and timeline management.

Daily Workflow

Morning Routine (30 min)

```
Check all project status updates
Review today's calls and deadlines
Check client messages/emails
Review blockers flagged by team
Update project tracking
Prioritize communications
```

Core Activities

```
1. CLIENT COMMUNICATION (2-3 hours)
    Respond to client messages
    Conduct scheduled calls
    Send progress updates
    Handle concerns

2. INTERNAL COORDINATION (2 hours)
    Sync with Technical Lead
    Check developer progress
    Unblock issues
    Coordinate resources

3. PROJECT TRACKING (1 hour)
    Update project status
    Track milestones
    Monitor timeline
    Flag risks

4. ADMINISTRATION (1 hour)
    Documentation
    Billing/invoicing
    Reporting
    Planning
```

Receiving Handoff from Closer

Handoff Review Checklist

```
VERIFY ALL DOCUMENTATION:

 Signed contract received
 Deposit payment confirmed
 Scope of work clear
 Contact information complete
 Timeline expectations understood
 Special requirements noted
 Kickoff date scheduled (or to schedule)

IF ANYTHING MISSING:
 Contact Closer immediately
 Do not start project with gaps
```

Kickoff Preparation

```
BEFORE KICKOFF CALL:

 Create project in PM tool
 Set up project folder
 Assign Technical Lead and Developer
 Brief the team on project
 Prepare kickoff agenda
 Prepare client pre-call checklist
 Confirm kickoff date/time
```

Kickoff Call Procedure

Pre-Kickoff Email to Client

```
Subject: Kickoff Call Prep - [Project Name]

Hi [Name],

Looking forward to our kickoff call on [Date] at [Time]!

TO PREPARE, PLEASE HAVE READY:
 Sample data/examples we discussed
 List of tools/systems we'll integrate
 Access credentials (we'll help set these up)
 Any stakeholders who should join

AGENDA:
1. Introductions (5 min)
2. Scope & timeline review (10 min)
3. Environment setup (20 min)
4. Credential configuration (15 min)
5. Next steps (10 min)

JOIN LINK: [Zoom/Meet link]

See you soon!

[Your Name]
```

Kickoff Call Framework (60 min)

```
0:00 - INTRODUCTIONS (5 min)
────────────────────────────
- Introduce team members
- Explain roles
- Ice breaker

0:05 - SCOPE REVIEW (10 min)
────────────────────────────
- Walk through deliverables
- Confirm understanding
- Clarify any questions
- Set success criteria

0:15 - TIMELINE REVIEW (5 min)
─────────────────────────────
- Phase overview
- Key milestones
- Client dependencies
- Check-in schedule

0:20 - ENVIRONMENT SETUP (20 min)
─────────────────────────────────
- n8n account setup/access
- Workspace configuration
- Team member invites
- Basic orientation

0:40 - CREDENTIAL SETUP (15 min)
────────────────────────────────
- Walk through first integration
- Explain secure setup process
- Client enters credentials
- Verify connections

0:55 - NEXT STEPS (5 min)
─────────────────────────
- What you'll do next
- What they need to provide
- Next check-in date
- Communication protocol
```

Post-Kickoff Actions

```
IMMEDIATE (Same Day):

 Send kickoff summary email
 Share all documentation links
 Assign tasks to development team
 Set next check-in date
 Update project status

KICKOFF SUMMARY EMAIL:

Subject: Kickoff Complete - [Project Name]

Hi [Name],

Great kickoff! Here's a summary:

WHAT WE AGREED:
- [Key decisions]
- [Confirmed requirements]

ACTION ITEMS:

YOU:
 [Client task 1]
 [Client task 2]

US:
 [Our task 1]
 [Our task 2]

NEXT CHECK-IN:
[Date/Time]

COMMUNICATION:
- Slack/Email for quick questions
- Weekly update videos
- Bi-weekly sync calls (optional)

Questions? Just reply to this email.

[Your Name]
```

Ongoing Project Management

Weekly Client Update

```
WEEKLY UPDATE FORMAT (Loom or Email):

Subject: Weekly Update - [Project Name] - Week [X]

Hi [Name],

Here's your weekly update!

 COMPLETED THIS WEEK:
- [Item 1]
- [Item 2]
- [Item 3]

 IN PROGRESS:
- [Item 1] - [X]% complete
- [Item 2] - [X]% complete

 NEXT WEEK:
- [Item 1]
- [Item 2]

 NEED FROM YOU:
- [If anything needed]

 BLOCKERS/RISKS:
- [If any, otherwise "None!"]

We're on track for [milestone/completion date].

Questions? Reply anytime!

[Your Name]
```

Check-In Call Agenda (30 min)

```
BI-WEEKLY CHECK-IN:

0:00 - Status Update (10 min)
─────────────────────────────
- Progress overview
- Demo current state
- Timeline status

0:10 - Client Feedback (10 min)
───────────────────────────────
- How's it looking?
- Any concerns?
- Changes needed?

0:20 - Open Discussion (10 min)
───────────────────────────────
- Questions
- Clarifications
- Upcoming decisions
- Next steps
```

Issue Escalation

```
ISSUE SEVERITY LEVELS:

 CRITICAL (Escalate immediately)
- Project blocked
- Major scope change
- Client complaint
- Timeline at risk
 Escalate to: Technical Lead + Agency Owner

 HIGH (Escalate same day)
- Significant blocker
- Client confusion
- Resource conflict
 Escalate to: Technical Lead

 MEDIUM (Monitor, escalate if persists)
- Minor delays
- Small clarifications
- Resource adjustments
 Handle yourself, document

 LOW (Handle routinely)
- Normal questions
- Minor adjustments
 Handle yourself
```

Scope Management

Handling Scope Requests

```
WHEN CLIENT ASKS FOR MORE:

STEP 1: ACKNOWLEDGE
"That's a great idea! Let me note that down."

STEP 2: CLARIFY
"Can you tell me more about what you're thinking?"

STEP 3: ASSESS
Compare to original scope.
In scope?  Add to current work
Out of scope?  Continue to step 4

STEP 4: EXPLAIN
"That's outside our current project scope. However,
we can definitely add it as a future enhancement or
quote it as an addition to this project."

STEP 5: DOCUMENT
Add to backlog for future discussion

STEP 6: OFFER OPTIONS
"Would you like me to get a quote for adding this
now, or shall we save it for a phase 2?"
```

Scope Change Process

```
IF SCOPE CHANGE APPROVED:

1. Document the change in writing
2. Get cost/timeline impact from Technical Lead
3. Prepare change order or updated SOW
4. Get client approval in writing
5. Update project timeline
6. Brief development team
7. Continue work
```

Handover & Delivery

Pre-Handover Coordination

```
BEFORE HANDOVER CALL:

 Confirm with Tech Lead/Developer
   - All deliverables complete
   - QA passed
   - Documentation ready
   - Credentials swapped

 Prepare handover package
   - Video walkthrough recorded
   - Written docs complete
   - Backups exported
   - FAQ prepared

 Schedule handover call
   - Invite all stakeholders
   - Block appropriate time
   - Send agenda

 Prepare for go-live
   - Final checklist ready
   - Support plan clear
```

Handover Call Coordination

```
HANDOVER CALL ROLES:

YOU (PM):
- Facilitate the call
- Manage agenda
- Capture questions
- Confirm acceptance
- Set support expectations

TECHNICAL LEAD/DEVELOPER:
- Conduct technical walkthrough
- Demo the system
- Answer technical questions
- Go-live execution
```

Post-Handover

```
AFTER HANDOVER CALL:

Same Day:
 Send handover email with all materials
 Share call recording (if recorded)
 Confirm support period start

First Week:
 Daily check with development team
 Quick client check-in (day 3)
 Address any issues promptly

End of Support Period:
 Final review with client
 Confirm acceptance
 Send final invoice
 Discuss retainer (if applicable)
 Collect testimonial
 Archive project
```

Financial Management

Invoicing Schedule

```
STANDARD PROJECT:

Invoice 1: Deposit
- When: Upon contract signing
- Amount: 50% of total
- Status: [Track]

Invoice 2: Final
- When: Upon completion/acceptance
- Amount: 50% of total
- Status: [Track]

_________________________

RETAINER:

Monthly Invoice:
- When: 1st of month
- Amount: Monthly retainer fee
- Due: Net 15

Track overages separately
```

Invoice Template Prep

```
FOR EACH INVOICE:

 Project name
 Invoice number
 Date
 Client details
 Line items with descriptions
 Total amount
 Payment terms
 Payment methods
 Due date
```

Payment Follow-Up

```
IF PAYMENT LATE:

Day 1 after due: Friendly reminder email
Day 7: Phone call or direct message
Day 14: Formal follow-up email
Day 30: Escalate to Agency Owner

TEMPLATE:

Subject: Invoice Reminder - [Invoice #]

Hi [Name],

Just a friendly reminder that invoice [#] for $[X]
was due on [date].

If you've already sent payment, please disregard!
Otherwise, please let me know if there are any issues.

Payment link: [Link]

Thanks!
[Your Name]
```

Reporting

Weekly Internal Report

```
WEEKLY PROJECT STATUS:

PROJECT: [Name]
STATUS: [ On Track /  At Risk /  Blocked]

Progress: [X]% complete
Timeline: [On schedule / X days behind]

Completed:
- [Item]

In Progress:
- [Item] - [Who]

Blockers:
- [If any]

Client Satisfaction: [Good / Neutral / Concerns]

Notes:
- [Anything important]
```

Monthly Summary

```
MONTHLY REPORT:

PROJECTS ACTIVE: X
PROJECTS COMPLETED: X
PROJECTS STARTED: X

HIGHLIGHTS:
- [Key accomplishments]

CHALLENGES:
- [Issues encountered]

IMPROVEMENTS:
- [Process improvements made]

NEXT MONTH:
- [Upcoming milestones]
```

Best Practices

```
DO:
 Communicate proactively
 Document everything
 Set clear expectations
 Respond within 24 hours
 Protect scope (politely)
 Celebrate milestones with client
 Keep internal team informed
 Follow up on action items

DON'T:
 Make technical promises without checking
 Let issues fester
 Skip documentation
 Over-promise on timeline
 Let client surprise the dev team
 Send invoices late
 Forget to follow up
```

Next: See `05-sop-technical-lead.md` for Technical Lead procedures.
