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# STANDARD OPERATING PROCEDURES (SOPS)

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Workflow Automation Delivery Framework

**ENTERPRISE EDITION**

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# 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

```
┌──────────────────────────────────────────────────────────┐
│                    TEAM STRUCTURE                        │
├──────────────────────────────────────────────────────────┤
│                                                          │
│  SALES FUNNEL                   DELIVERY TEAM            │
│  _____                    _____            │
│                                                          │
│  ┌─────────────┐                ┌──────────────┐         │
│  │ Lead Gen VA │ ─────────────→ │ Project      │         │
│  │             │                │ Manager      │         │
│  └─────────────┘                └──────────────┘         │
│         │                              │                 │
│         ▼                              │                 │
│  ┌─────────────┐                       │                 │
│  │ Sales Rep   │                       │                 │
│  │             │                       │                 │
│  └─────────────┘                       │                 │
│         │                              ▼                 │
│         ▼                       ┌──────────────┐         │
│  ┌─────────────┐                │ Technical    │         │
│  │ Closer      │ ─────────────→ │ Lead         │         │
│  │             │                └──────────────┘         │
│  └─────────────┘                       │                 │
│                                        ▼                 │
│                                 ┌──────────────┐         │
│                                 │ Developer    │         │
│                                 │              │         │
│                                 └──────────────┘         │
│                                        │                 │
│                                        ▼                 │
│                                 ┌──────────────┐         │
│                                 │ Client       │         │
│                                 │              │         │
│                                 └──────────────┘         │
│                                                          │
└──────────────────────────────────────────────────────────┘
```

# 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

```
flowchart LR
    subgraph SALES["Sales Funnel"]
        LEAD["Lead Gen"]
        QUALIFY["Qualify"]
        DISCOVER["Discovery"]
        PROPOSE["Propose"]
        CLOSE["Close"]
    end

    subgraph DELIVERY["Delivery"]
        KICKOFF["Kickoff"]
        BUILD["Build"]
        TEST["Test"]
        DELIVER["Deliver"]
    end

    subgraph SUPPORT["Support"]
        SUPPORT_PERIOD["Support"]
        MAINTAIN["Maintain"]
        EXIT["Exit"]
    end

    LEAD --> QUALIFY --> DISCOVER --> PROPOSE --> CLOSE
    CLOSE --> KICKOFF --> BUILD --> TEST --> DELIVER
    DELIVER --> SUPPORT_PERIOD --> MAINTAIN --> EXIT
```

# 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.

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