



STANDARD OPERATING PROCEDURES (SOPs)

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Author: Mirza Iqbal

Contact: mirza.iqbal@next8n.com

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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



SOP Document Index

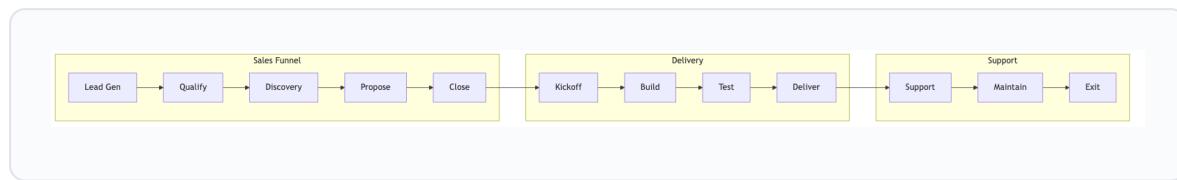
ROLE	DOCUMENT	PURPOSE
Lead Gen VA	01-sop-lead-gen-va.md	Lead sourcing, qualification, outreach
Sales Representative	02-sop-sales-rep.md	Discovery, relationship building
Closer	03-sop-closer.md	Proposals, negotiations, contracts
Project Manager	04-sop-project-manager.md	Coordination, communication, timeline
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.

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