CMA

COLEMAN MANAGEMENT ADVISORS

SOP Starter Kit

Turn what lives in your head into systems the business can run on — the template, a worked example, and a blank you can copy.

FREE TEMPLATE · DOCUMENTATION THAT SCALES

> A business that runs on memory can't scale and can't be handed off. An SOP (Standard Operating Procedure) makes a repeatable task repeatable by anyone. Start with the 3–5 tasks that break most often when you're away.

1 What every SOP needs

- **Purpose** — why this procedure exists and what "done right" looks like.
- **Scope & owner** — when it applies and who is accountable.
- **Steps** — numbered, specific, in order, with no assumed knowledge.
- **Quality checks** — how to know each step was done correctly.
- **Revision** — last updated and by whom.

2 Worked example — New client onboarding

Purpose: Every new client is set up consistently within 2 business days of signing, so nothing falls through the cracks.
Owner: Operations lead · **Applies when:** a signed agreement is received.

Steps:

1. Save the signed agreement to the client folder; log the start date.
2. Create the client record in the CRM with scope, price, and key dates.
3. Send the welcome email + intake form within 24 hours.
4. Schedule the kickoff call; add deliverable due dates to the calendar.
5. Set up billing (invoice schedule or payment link).

Quality check: CRM record complete, kickoff booked, first invoice scheduled — confirmed by the owner before day 2 ends.

3 Blank template — copy this for each task

Procedure name:

Owner: **Applies when:**

Purpose / definition of done:

Steps (numbered, specific):

Quality checks:

Last updated: **By:**

CMA documents your core operations with you. See current fractional COO scopes and pricing at colemanma.com, then book a 30-minute call.