Small Business SOP Kit — Free Sample

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SOP 01 — Answering a new customer enquiry

Purpose: To answer every new enquiry quickly, politely and completely, so a potential customer gets a helpful reply the same working day and knows exactly what happens next.

Scope: Every new enquiry by email, website form, phone or social media message, from anyone who might become a customer of Brightline Studio, a 6-person design and marketing services business. It does not cover complaints from existing customers (see SOP 03).

Who does it: The studio manager answers enquiries. If the studio manager is away, the lead designer answers them. Nobody else replies to a new enquiry without asking the studio manager first.

Steps

1. Check the inbox and messages at 9:00 am, 12:30 pm and 3:30 pm every working day. Answer every new enquiry within four working hours.
2. Read the whole enquiry before replying. Note what the customer wants, when they need it, and any budget they mention.
3. Reply in the same channel they used, using their first name and a friendly tone. Thank them for getting in touch.
4. Answer their question directly. If they ask for a price, give a realistic range and say a firm quote follows once we know the details.
5. Ask the three questions we always need: what they need done, when they need it finished, and what their budget range is. Do not ask again if they already answered.
6. Offer a 20-minute introductory call and suggest two specific times in the next three working days. Include the studio manager's phone number.
7. Log the enquiry in the enquiry tracker: date, customer name, what they asked for, and the date of the call or reply sent.
8. If the enquiry is not something we do, say so kindly and suggest one alternative provider if we know a good one. Never leave it unanswered.
9. If there is no reply within five working days, send one short follow-up asking if they still want to talk. Close the enquiry if there is still no reply after five more working days.

Quality check: Before sending, read the reply once through. Check the customer's name is spelled correctly, every question has an answer, and the next step is clear. The studio manager checks any reply that promises a price or a deadline.

If it goes wrong: If an enquiry sits unanswered for more than one working day, the studio manager calls the customer, apologises briefly, and answers on the call. If we gave a wrong price range, tell the customer honestly and offer the introductory call to work through the correct range.

Records: Keep every enquiry and reply in the enquiry tracker: date, customer name and contact details, what they asked for, what we quoted, and the outcome (became a customer, not now, or not a fit).

SOP 02 — Onboarding a new customer

Purpose: To welcome a new customer properly, agree exactly what we will do for them, and get everything we need to start work without delays or confusion.

Scope: Every new customer of Brightline Studio once they have accepted a quote and agreed to start, from the accepted quote to the first piece of work being delivered. It does not cover renewing or changing an existing project.

Who does it: The studio manager runs the onboarding. The designer who will do the work joins the kick-off call. The customer supplies the information we ask for.

Steps

1. Send a welcome email within one working day of the customer accepting the quote. Thank them and confirm what we agreed to do, the price, and the delivery date.
2. Attach the written agreement for the customer to sign. It must state the scope, the price, the payment terms (50% deposit, 50% on delivery), and the rounds of changes included (two).
3. Send the deposit invoice with the welcome email. Work does not start until the deposit is paid or the customer confirms in writing that payment is on its way.
4. Send a short starter checklist asking for: logo and brand files, website or social account access if needed, the names of the people we will work with, and examples of work they like.
5. Book a 30-minute kick-off call within five working days of the deposit being paid. Send the call link and a simple agenda: goals, timeline, who does what, and how we will communicate.
6. On the call, agree the customer's single point of contact, weekly updates by email, and the first delivery date.
7. After the call, send a one-page summary email within one working day confirming everything agreed: scope, dates, contacts, and the weekly update day.
8. Create the customer's project folder and save the signed agreement, the paid deposit invoice, the starter checklist, and the kick-off summary in it.

9. Tell the designer the project has started, share the folder, and confirm the first delivery date with them.

Quality check: Before the kick-off call, check that the agreement is signed, the deposit is paid, and the starter checklist has been received or chased. If anything is missing, agree it on the call with a date.

If it goes wrong: If the customer does not pay the deposit within five working days, the studio manager calls them to check whether there is a problem and offers a new start date. If the customer sends files we cannot open, tell them within one working day and ask for a different format. If the scope changes, write down the change, confirm the new price or date in writing, and get agreement before work starts.

Records: Keep the signed agreement, deposit invoice and payment confirmation, starter checklist, kick-off summary email, and project folder for as long as the project runs and for two years after.