

SOP CHECKLIST FOR MARKETING AGENCIES



GETTING STARTED WITH SOPS

- Define Your Goals
- Document and Detail Each Process
- Train Your Team
- Review and Update Regularly

ESSENTIAL SOPS FOR A MARKETING AGENCY

- Client Onboarding Call
- Client Account Management
- Client Reporting
- Client Off-boarding

CLIENT ONBOARDING CALL

- Define The Purpose Of The Call
- Outline Team Member and Client Responsibilities
- Pre-call Preparation
- Prepare Call Agenda
- Setup Communication Tools

CLIENT ACCOUNT MANAGEMENT

- List Task Deadlines and Establish Timelines
- List Scheduling Dates
- Final Project Publication
- Account Engagement Methods
- Track Metrics and Measurables

CLIENT REPORTING

- Determine Frequency and Timing Of Reports
- Identify All Relevant Data Sources
- Determine KPIs and Metrics To Include
- Choose A Standard Reporting Method
- Collect and Analyze Data
- Client Feedback

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(continued)



CLIENT OFF-BOARDING

- Verify Contract Terms
- Determine Any Outstanding Obligations Before Offboarding
- Notify Team Members Involved In The Client Project
- Schedule and Conduct An Offboarding Meeting To Discuss The Transition
- Offer Space For Client Feedback and Document For Future Opportunities
- Update Project Management Systems To Reflect Offboarding
- Prepare and Send A Formal Closure Letter