

AGENCY OPERATIONS TEMPLATE

Agency SOP Template Kit

A one-page SOP format people actually follow, plus the rules that keep a process library from rotting into documentation nobody opens.

Most agency SOPs fail the same way: they are written once, stored somewhere sensible, and never opened again. This kit uses a one-page format, an owner on every document, and a review date that makes staleness visible. If an SOP does not fit on one page, the process is the problem.

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How to use this kit

The value of an SOP is not that the process is written down. It is that someone who has never done the task can complete it correctly on their first attempt.

- 1 **Write it while doing the task, not from memory.** Memory skips the steps that feel obvious, which are exactly the ones a new person gets wrong.
- 2 **Give it to someone who has never done it.** Watch them work through it without helping. Every question they ask is a missing step.
- 3 **One page, always.** If it does not fit, either the process needs splitting or it needs simplifying. A three-page SOP does not get read.
- 4 **Name an owner.** Unowned documentation is abandoned documentation.
- 5 **Set a review date at creation.** An SOP with no review date is trusted long after it stopped being true, which is worse than having none.

THE TEST THAT MATTERS

Hand the SOP to a competent person who has never done the task. If they finish it without asking you anything, the SOP works. If they ask even one question, the answer goes into the SOP before you do anything else.

The rules that keep SOPs alive

Written where the work happens

An SOP in a folder nobody opens is decoration. Link it from the task, the project template, or the checklist people already use.

Owned by one person

Not a team, not a department. One name, who is responsible for it being true.

Reviewed on a date

Every SOP carries a review date. Past that date it is flagged stale until someone confirms it or fixes it.

Updated by whoever finds the gap

If following an SOP goes wrong, the person who hit the problem fixes the document. Not a ticket, not later.

Write steps like this

INSTEAD OF	WRITE
Check the site is working	Open <u> URL </u> in a private window. Confirm the homepage loads and the contact form submits successfully
Update the client	Send the weekly update using template <u> name </u> , by 5pm Friday, to the named approver only
Make sure backups are on	In <u> tool </u> , confirm the last backup is under 24 hours old and the retention is set to <u> 30 </u> days
Optimise images	Export at <u> width </u> px wide, WebP, quality <u> 80 </u> . Anything above <u> 200 </u> KB gets recompressed

VERBS AND NUMBERS

Every step should start with a verb and contain a number, a name, or a threshold wherever a judgement is required. 'Check it looks right' is not a step. It is a request for someone to guess what you would have done.

The blank SOP page

SOP:

Process name

Version

1.0

OWNER Name	LAST UPDATED Date	REVIEW BY Date
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TRIGGER What causes this process to start	OUTCOME What is true when it is finished
TOOLS REQUIRED	TIME IT SHOULD TAKE

Steps

ONE VERB PER LINE, NUMBERED, WITH THRESHOLDS WHERE JUDGEMENT IS NEEDED

COMPLETE WHEN

Write the finish condition here. Not 'the task is done' but the observable thing that proves it: the file exists, the client replied, the check passed.

A worked example

SOP: Monthly WordPress maintenance run

Version 2.1

OWNER	LAST UPDATED	REVIEW BY
Lead developer	Date	Date + 6 months

	DETAIL
Trigger	First Tuesday of each month, or after any critical security release
Outcome	Every site on the maintenance plan is updated, verified, and logged
Tools	<u>Management dashboard</u> , staging environment, uptime monitor
Time	About 20 minutes per site

Steps

- 1 Confirm a backup completed in the last 24 hours. If not, run one and wait for it to finish before continuing.
- 2 Push updates to staging first. Never update production directly.
- 3 Update core, then plugins, then theme, in that order. Update one plugin at a time for anything handling payments or forms.
- 4 On staging, load the homepage, one interior page, and submit the contact form. Confirm all three work.
- 5 For ecommerce, add a product to the cart and reach the payment step without completing it.
- 6 Push to production. Repeat the same three checks within 10 minutes.
- 7 Confirm the uptime monitor shows no incident, and record the run in the client log.

COMPLETE WHEN

The client log shows today's date, the version numbers applied, and a pass on all three post-deploy checks. Anything that failed is either fixed or raised as a ticket with the client informed the same day.

Which processes to document first

Do not try to document everything. Start with the tasks that are frequent, high-consequence, or trapped in one person's head.

PRIORITY	DOCUMENT WHEN	TYPICAL EXAMPLES
First	Frequent and consequential if wrong	Site launch, maintenance run, backup restore, client offboarding
Second	Only one person knows how	Billing run, hosting provisioning, DNS changes, contract issue
Third	New hires need it in week one	Project setup, time logging, client communication, escalation
Later	Rare but high-stakes	Security incident, data breach response, disputed invoice
Never	Changes faster than you can maintain it	Anything tied to a UI that redesigns every quarter

Your first five

NAME THEM, WITH AN OWNER BESIDE EACH

THE BUS TEST, APPLIED HONESTLY

Ask which single task would cause the most damage if the person who does it were unreachable for two weeks. That is your first SOP, regardless of how boring it is.

The SOP register

One page listing every SOP, its owner, and its review date. This is what makes staleness visible instead of silent.

SOP	OWNER	VERSION	UPDATED	REVIEW BY	STATUS

STATUS VALUES

Current - reviewed within its cycle. **Stale** - past its review date, use with caution. **Retired** - process no longer exists, kept for reference only.

Quarterly SOP review

Thirty minutes, once a quarter. Longer than that and it stops happening.

- ☐ Every SOP past its review date has been confirmed, updated, or retired
- ☐ Every SOP still has a named owner who is still at the company
- ☐ Any process that changed this quarter has had its SOP updated, not just discussed
- ☐ Anything that went wrong this quarter has either an SOP or a reason it does not need one
- ☐ New hires were asked which SOP they found unclear, and the answers were acted on
- ☐ SOPs nobody has opened in twelve months are reviewed for retirement

Log the outcome

REVIEWED	CONFIRMED	UPDATED	RETIRED	NEW

THE SIGNAL TO WATCH

If nothing was updated this quarter, either your processes are unusually stable or nobody is reading the SOPs. It is almost always the second one.

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SEO strategy

Technical fixes, topical coverage, and search visibility work measured against clicks, not scores.

Content marketing

Research-led articles and editorial systems your team can keep publishing without us.

Conversion design

Landing pages, service pages, and forms designed around the decision the reader is actually making.

Need this handled instead of templated?

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