FILLED FICTIONAL EXAMPLE

Standard Operating Procedure Template

1 Start conditions and ordered work

Document one repeatable job. Add or remove rows to match the real work; keep the exception and completion page with the steps.

Procedure: new-client setup | Fictional design studio | Version 1.0

Purpose result and boundaries

What should this procedure achieve? State the start and finish, and any important exclusion.

Set up an accepted design assignment with the correct brief, roles and first milestone. Finish when the project record and agreed kickoff details are saved. Excludes selling the service, changing agreed terms and doing the design work.

Trigger and required inputs

What starts the task? What must be available or verified before work begins?

Account lead confirms acceptance of the agreed brief and authorises setup. Coordinator needs the current brief, authorised client contact, agreed dates and access details. Missing acceptance or an unclear brief stops setup for clarification.

People tools and records

Who follows this? Which current tools, permissions and records do they need?

Coordinator follows the steps; delivery lead checks the setup; account lead resolves scope questions. Use the approved client form, project workspace and access procedure. Request only the information needed for this assignment.

Step	Role	Action and tool	Check and next step
1	Coordinator	Open the accepted brief and client record. Match the assignment and authorised contact.	Acceptance and current brief are confirmed. If not, hold setup and ask the account lead.
2	Coordinator	Request the agreed starting information through the approved client form.	Required items and permissions are present. Record missing items; do not invent answers or request account passwords.
3	Coordinator	Create the project from the brief; assign the delivery lead and first milestone.	Check scope, dates and access with the delivery lead. A requested scope change goes to the account lead before commitment.
4	Coordinator	Send the agreed kickoff details to the authorised client contact through the normal channel.	Delivery lead confirms readiness first. Give the client a clear next action and contact for questions.
5	Delivery lead	Confirm the setup record and next action are complete; return any gap to the coordinator.	Save the current brief, kickoff reference and next owner/date. Mark setup complete only when these checks pass.

FILLED FICTIONAL EXAMPLE

Procedure Checks and Exceptions

2 Handle exceptions and confirm completion

Procedure: new-client setup | Version 1.0

Exceptions and decision paths

Say what stops, what may continue, who decides and what permits the work to resume.

Exception or decision	What to do now	Who decides and how work resumes
Acceptance or required information is missing	Record the gap and pause the affected setup step. Continue only unrelated preparation that needs no new access or commitment.	Account lead clarifies acceptance; coordinator obtains the missing items. Resume after the prerequisite is checked.
Client requests extra work or a different deadline	Record the requested change and its effect. Do not promise it or silently edit the agreed brief.	Account lead agrees the response with the delivery lead and client. Use the revised brief only once approved.
Project system is unavailable or access appears wrong	Stop using the affected system. Report the issue through the normal support route; do not put client information in an unapproved workaround.	System owner restores approved access. Coordinator checks the record before resuming; delivery lead resets the next action if needed.

Completion checklist

Check essential results before marking the work complete. These are checks, not a second copy of every step.

- ☐ Accepted brief and authorised contact checked
- ☐ Required inputs and permitted access confirmed
- ☐ Project roles and first milestone checked
- ☐ Kickoff details saved in the project record
- ☐ Next action has an owner and date
- ☐ Unresolved items are assigned and visible

Completion record

Where is completion recorded and what reference shows the result?

Project workspace: current brief, kickoff reference and named next action. Delivery lead confirms the setup status after the checks pass.

Maintain the current procedure

Owner: delivery lead | Version 1.0 | Issued: 4 November 2026

Current copy: studio operations workspace. Review after the first two setups or a material process change.

Test one normal case and one exception with the person who will use it. Record the correction, owner and next version.

Next test: coordinator walks a normal setup and a missing-input case with the delivery lead; record corrections before adoption.

Current explanation and related tools: navigateadvisorygroup.com/articles/standard-operating-procedure

Standard operating procedures and task checklists are established operating practices. This adaptable structure, explanation and fictional example are original Navigate material.