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Marketing agency SOPs: the 3 to write first

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If you're about to write SOPs for your agency, I'd start with 3 and leave the rest for later. For most agencies those are client onboarding, core service delivery and internal handover. I think 1 solid system that the team uses is worth a lot more than 10 SOPs that sit in a folder.

Read this online at flexops.co/resources/marketing-agency-sops

When an agency needs this

This is for the owner who says that things happen the same way sometimes, or who finds that across the key activities in the business, the same thing rarely happens twice. If that's you, I'd start with the most impactful and most typical systems an agency should have, which is why I start with these 3.

Most agencies I work with have tried to document their processes at least once before we start, and it usually goes the same way. The owner reads something about SOPs, gets motivated, and tries to document everything in 1 go, every workflow and every little thing. Then 1 of 2 things happens. Either it doesn't get finished, or it gets done to a low standard and sits in a folder that no one opens.

The intention is right. I think the execution is too ambitious, too early.

Is it too early to write processes?

I hear 2 things from owners on this. The first is "It's too early to worry about processes. We're still figuring things out." The second is "This is a mess. We can't grow without processes."

What has changed between those 2 statements? Usually, nothing at all. I don't believe there's a perfect time to start building processes, but starting today will be easier than starting in 6, 12 or 24 months, because the longer you wait, the harder the mess is to fix.

Step 1: map what happens now

When I do this with an owner, we start from scratch. For each system, we're trying to set out the fundamental things that happen, step by step. We're also learning from what's going well, and working out what can be built into a recurring process, so I suppose it's a bit of a process mapping exercise.

I'd map the processes that exist in the agency right now, even if they're messy, before the ones you think should exist. You're looking for what really happens, which is often different from what you think happens.

For each process, I'd note who does it now, whether it's written down, how often it happens, and whether it breaks when that person is off.

Step 2: pick the 3

Then pick 2, maybe 3, that the agency relies on every week. For most agencies in the 500k to 1m range, it's usually something like this.

System	Why it comes first
Client onboarding	A poor start creates problems that compound for months.
Core service delivery	It's the thing the agency gets paid to do, so it should be written down clearly enough that it doesn't live in 1 person's head.
Internal handover	It's how work moves between people without things falling through the cracks.

Planning is the other one I'd add once these are working, along with handovers to and from clients.

What goes into client onboarding

To give you an example of 1 of the 3, the key thing with client onboarding is understanding the client and setting them up well. A lot of it is about what they expect, what they need and what their goals are.

It's also about understanding them as people. How are they going to work with you? What should you watch out for, what should you stress, and what should you leave to one side? I'd take the time during onboarding to get to know the client as well as you possibly can, so that the relationship gets off to a good start.

Step 3: make them usable before you make them perfect

I'd start there and get those right. When the whole team sees a half-finished Notion workspace with 40 empty templates, it makes the problem worse, because people lose confidence in the system before it has a chance to work. In my experience, waiting for it to be perfect is usually a way of putting it off.

I'd keep each system to 1 page. If it doesn't fit on a page, it's probably more than 1 system. On that page I'd have:

- The name of the system.
- Who owns it.
- When it starts.
- The steps.
- What done looks like.
- Where it lives.
- When it was last reviewed.

Then put them together in 1 place, as a manual for how the agency functions. It should be home to all of the key systems, structured and well organised, regularly updated, and easy for the team to get to and use.

Step 4: improve 1 thing a month

If someone on your team is constantly saving the day, it means the day keeps needing to be saved. That usually means the systems behind them are either missing or broken, and great people can't carry a broken operation forever. So once your 3 are in place, I'd keep improving them like this.

1. **Pinpoint the bottlenecks.** Where does work stall? I'd talk to the team, because they already know, and it may not be where you think.
2. **Start tracking 2 things.** Delivery time, which is how long work takes from brief to completion, and escalations, which is how often something needs to be rescued.
3. **Run a systems sprint.** You can't fix everything at once. Pick the most urgent part of the process and work on it with the team, and don't hand it down to them.
4. **Test it, gather feedback and tweak it.** Run the updated process, see what works and what doesn't, and then improve it. This is the part that gets skipped most.
5. **Make it a process in itself.** I'd do 1 sprint a month, with the most urgent areas first, and then work outwards.

Where owners get this wrong

- **Trying to document everything in 1 go.** It's the most common one, and it's why most first attempts don't get finished.
- **Writing down what should happen.** If the document doesn't match what the team does, they won't trust it.
- **Waiting for the right time.** There isn't one, and it only gets harder.
- **Writing it for the team and not with them.** They know where the work stalls, so I'd involve them from the start.

Questions owners ask about this

What SOPs does a marketing agency need?

To start with, I'd say 3: client onboarding, core service delivery and internal handover. Planning, and handovers to and from clients, come next once those are working.

When should an agency start writing SOPs?

I don't think there's a right time, so I'd start now with a small number. It's easier today than it will be in 6 or 12 months.

How long should an SOP be?

I'd keep each system to 1 page, with the owner, the steps and what done looks like. If it runs longer than that, it's probably more than 1 system.

Where should our SOPs live?

In 1 place the whole team can get to, kept organised and up to date. Which tool you use matters less than whether people open it.

If you'd like a hand with it

I go through the 3 systems in more detail in a 15 minute video, Build These 3 Systems, Your Agency Will Grow Itself. If you're not sure which 3 are right for your agency, drop me a note or, by all means, book a call and I'll help you pick where to start. The Agency Health Check will also show whether systems are the first thing to work on.