

- BUILD A BUSINESS, NOT A JOB

The Agency SOP Starter Library

The six SOPs that turn an owner-run agency into a business that runs without you. Each one is a **one-page checklist** with an owner, a tool, a trigger, and a "done when" line, plus a **blank fillable version** you customize in an afternoon. The same systems that push client lifespan from 24 months to 56 and make an agency worth 8x to 12x EBITDA instead of 3x.

Sales Call SOP

Lead-Gen SOP

Onboarding SOP

Fulfillment SOP

Reporting SOP

Offboarding SOP

The blank fillable canvas

The Bus Test self-audit

THE BUS TEST

If you vanished for 30 days, which of these would break?

An agency that runs on you is not a business. It is a job that owns you. Score yourself honestly. Every box you check on the right is a process that lives in your head and dies the day you step away.

The 6-Function Self-Audit

Check one box per row

		RUNS	ME
1	Selling Could someone else run a discovery call and close at your rate without you on the line?	☐	☒
2	Getting leads Does new pipeline appear every week whether or not you personally prospect?	☐	☒
3	Onboarding Does a signed client get their kickoff, access, and first win without you running it?	☐	☒
4	Delivery Can work ship at your quality bar without your personal sign-off on every piece?	☐	☒
5	Reporting Does every client get a clear money report on the same day each month, on autopilot?	☐	☒
6	Offboarding When a client leaves, do you capture the testimonial, the referral, and the win-back?	☐	☒

Most owners check "Me" on five or six. That is the whole problem, and the reason a buyer looks at the agency and says "this is just you with a logo" before walking. The fix is not working harder. It is writing down what only lives in your head and handing it off.

WHAT PROCESS DOES FOR RETENTION

24 months average client lifespan, owner-run

↓

56 months once delivery is systemized

WHAT PROCESS DOES FOR EXIT VALUE

3x EBITDA: founder-dependent agency

↓

8-12x EBITDA: documented, systems-run

Retainer client lifespan and 1.6% vs 4% monthly churn math (SaaS Capital, agency benchmarks 2025). Agency valuation multiples reflect founder-dependency risk; documented, transferable operations command higher multiples (Punctuation / Barney & Co M&A guidance, 2025). Process inefficiency drains an estimated 20 to 30% of revenue. Results are not typical.

THE ANATOMY OF AN SOP THAT ACTUALLY GETS FOLLOWED

A real SOP answers four questions. **Nothing more.**

Most "SOPs" are 12-page Notion docs nobody opens. The ones that survive contact with a busy team are one page and end with the same four fields. Fill these in for every process and the work moves without you in the room.

**Owner**

The **one named person** accountable. Not a team, not "whoever's free." A role with a name next to it.

e.g. Account Manager – Priya

**Tool**

Where the work **actually happens**. Name the software and the exact template or board it lives in.

e.g. ClickUp "New Client" template

**Trigger**

The event that **starts the process**, with no one having to remember. A signed contract, a Monday, a closed deal.

e.g. Stripe payment received

**Done When**

The **observable finish line**. If a stranger looked at it, they could tell it was done. No "done when it feels good."

e.g. Client saw a tangible win by Day 7

If a court witness couldn't see that the step happened, it isn't a **step. It's a wish.**

The six SOPs that follow are written in this exact format. Each is a checklist with a role per step, the named tools, and a "Done when" line you can hold a person to. Read them as a **starting set, not gospel**. Cross out what doesn't fit your niche, change the numbers to your real ones, then copy them into your tool of choice. Page 10 is a blank canvas to write your own.

BUILD IN THIS ORDER (HIGHEST LEVERAGE FIRST)

1**Sales Call**

Fastest cash. Systemize the close first so revenue stops depending on your mood.

2**Lead-Gen**

Keep the top of the funnel full so you never go heads-down and starve.

3**Onboarding**

The biggest churn lever. 43% of clients leave in the first 90 days.

4**Fulfillment**

Get work off your desk at your quality bar with a QA gate before anything ships.

5**Reporting**

Prove the money every month so renewals stop being a fight.

6**Offboarding**

Turn every exit into a testimonial, a referral, and a 90-day win-back.

1

FASTEST CASH · BUILD THIS FIRST

The Sales Call SOP

~45 min call

OWNER

Closer / Founder

TOOL

Zoom + CRM + Calendly

TRIGGER

Qualified call booked

OPENER · SAY THIS WORD FOR WORD

"Before we start, I want to make sure this is worth your time. Can I ask you **3 questions**, and if it's not a fit, I'll tell you straight? Sound fair?"

THE 5-STAGE CLOSE FRAMEWORK

1

Frame

Set the agenda and the rule: it's a fit or it isn't.

2

Diagnose

Ask, don't pitch. Find the real bottleneck.

3

Quantify

Put the gap in dollars, in their words.

4

Present

Map the plan to the gap. Then price.

5

Handle

Price, timing, "think about it." Close.

- ☐ **Frame the call.** "Here's how I run these: I ask, you talk, and at the end I either show you a plan or tell you we're not a fit." **CLOSER**
- ☐ **Diagnose the bottleneck.** Run the discovery questions. Listen more than you talk. The top closers talk 43% of the call; average reps talk 68%. Aim to talk less.
- ☐ **Quantify the gap in dollars.** "So one lost client a month at [**retainer**] is [**\$X**] a year walking out the door. Did I get that right?" Make them say the number.
- ☐ **Present the plan, then the price.** Tie every deliverable to the gap they just named. Anchor the cost of inaction *before* you reveal the fee.
- ☐ **Handle the 3 objections** (price, timing, "let me think about it") and ask for the decision. Don't end on "I'll send a proposal." Book the next step on the call.



DONE WHEN

A decision is made on the call (yes, no, or a dated next step with the decision-maker confirmed) and the CRM is updated before you log off. Never "they're thinking about it" with no next action.



THE ONE RULE THAT SETS THE REST

Speed to lead. **Call or book every inbound lead inside 5 minutes.** Leads contacted within 5 minutes are up to 21x more likely to qualify than those contacted at 30 minutes (MIT / InsideSales). A perfect close script on a lead you called the next day is worth almost nothing.

Talk-time split (top closers 43% vs average 68%) from Gong Labs conversation analysis. 5-minute speed-to-lead 21x figure from the MIT / InsideSales Lead Response Management study. Results are not typical.

2

KILL THE FEAST-OR-FAMINE CYCLE

Weekly rhythm

The Lead-Gen SOP

OWNER Founder / Setter	TOOL CRM + Outreach tool + Scheduler	TRIGGER Every Monday, 8am
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THE PROBLEM THIS FIXES

You close two clients, go heads-down on delivery, and three months later you're scrambling. Prospecting only feels optional when the pipeline is full. The fix is a fixed weekly rhythm that runs whether or not you "feel like it."

THE FIXED WEEKLY CADENCE

MON	TUE	WED	THU	FRI
40 new outbound contacts. Pipeline review: count open opps.	1 content post. Reply to all inbound from the weekend.	40 outbound follow-ups. Touch every "not now" lead.	1 content post. Comment on 5 ICP posts.	Pipeline review. Forecast next 30 days. Flag gaps.

- ☐ **Hold the daily inbound SLA.** Every inbound lead gets a first response inside **5 minutes** during work hours. This is non-negotiable and it is the single highest-ROI habit in the whole SOP. **SETTER**
- ☐ **Send 40 new outbound contacts** against your saved ICP list (Geography, headcount, seniority, a warm trigger like a recent hire or post). Personalize the first line on every one.
- ☐ **Post 2x a week** on your one main channel. One proof post, one mechanism or contrarian take. End each with a soft DM trigger, never "book a call."
- ☐ **Friday pipeline review.** Total your open opportunity value. If it's under 3x your monthly revenue target, the next week's outbound volume goes up.



DONE WHEN

Your pipeline holds at least **3x your closed-revenue target** in open opportunities at all times, and no inbound lead waited more than 5 minutes for a first reply this week.

3x open pipeline to revenue target is the "never starve" ratio	5 min inbound response SLA, the cheapest lift you own	~50% of agencies still live on referrals they can't control
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Roughly half of agencies rely on referrals they cannot control, and feast-or-famine pipeline is the most-cited cause of stalled growth (2025 agency surveys; getting clients is named the #1 challenge by 37% of agencies). Results are not typical.

3

THE BIGGEST CHURN LEVER YOU OWN

The Onboarding SOP

14-day map

OWNER

Account Manager

TOOL

CRM + Typeform + Calendar

TRIGGER

Contract signed / paid

WHY THIS ONE MATTERS MOST

43% of B2B client churn happens in the first 90 days. The deal closes, the client gets excited, then it goes quiet for two weeks while you "figure out what you need." That silence is exactly when doubt creeps in. This SOP fills it with momentum.

- ☐ **Day 0 • Welcome + invoice.** Send the "you're in, here's what happens next" email with the 14-day map attached. Invoice goes out same hour. AM
- ☐ **Day 1-2 • Intake questionnaire.** Send the 12-15 field intake with a 48-hour deadline. Pre-fill everything sales already knows. Clients who finish intake in 48 hours retain above 85%; those who drag past 10 days drop below 50%.
- ☐ **Day 3 • Kickoff call** (inside 48 hours of signing). Fixed 30-45 min agenda: roles, success criteria, scope, cadence, the first-week quick win. Open with: "By the end of this call you'll know exactly three things - what we ship this week, who your point of contact is, and when we next talk."
- ☐ **Day 4-7 • Engineered quick win.** Ship something tangible: a delivered audit, one piece of live creative, a fixed tracking gap, a baseline dashboard. The client must *see* proof of life by Day 7.
- ☐ **Day 14 • Proactive status** before they ask. A short human update: here's what's done, here's what's next. This single touch lifts 6-month retention.
- ☐ **Day 30 • First results readout** against the baseline. Set the 30/60/90 frame: 30 is foundation, 60 is early signal, 90 is measurable lift.



DONE WHEN

The client has seen **one tangible win by Day 7**, the kickoff happened inside 48 hours of signing, and the 30/60/90 expectation is set in writing so nobody expects leads in week one.

THE FAILURE MODE THIS KILLS

"I lost a client at day 45 who told me **I just wasn't sure anything was happening.** We were working the whole time. I just never showed them." That client did not leave over results. They left over silence. The quick win and the Day-14 touch exist to make sure the work is **visible**, not just done.

43% of B2B churn in the first 90 days (Moxo, 2026). Intake-speed retention split and "86% stay loyal to businesses that invest in onboarding" (Wyzowl). Project-style agencies lose ~28% of clients inside six months. Results are not typical.

4

GET OFF THE CRITICAL PATH

The Fulfillment SOP

Per deliverable

OWNER

Project Lead

TOOL

ClickUp / Notion board + Loom

TRIGGER

Onboarding complete

THE SHIFT THIS MAKES

"Delivery quality is all over the place depending on who touches it, and I'm the only one who does it right." The fix is to define every stage with a **named input**, a **named output**, and a **named owner**, so work moves without the founder approving each piece. You become the QA gate, not the bottleneck.

THE DELIVERY PIPELINE (INPUT → OUTPUT → OWNER)

STAGE	INPUT (WHAT STARTS IT)	OUTPUT (WHAT "DONE" LOOKS LIKE)	OWNER
Intake	Signed brief + assets from onboarding	Scoped task list in the board, dated	Project Lead
Production	Scoped task list	First draft built to the spec sheet	Specialist
QA gate	First draft	Checklist passed, fixes logged	Project Lead
Approve	QA-passed work	Founder sign-off (approve only, not rebuild)	Founder
Ship	Approved work	Delivered to client + logged	Account Mgr

THE QA GATE (RUNS BEFORE ANYTHING TOUCHES THE CLIENT)

☐ Matches the written spec / scope

☐ Brand-voice and brand-asset pass

☐ Every claim and number fact-checked

☐ Links, tracking, and formatting work

☐ Tied back to the client's stated goal

☐ Named reviewer signed and dated it

✓ DONE WHEN

The deliverable passed every QA checkbox, the founder approved (did not rebuild), and it shipped on the dated cadence the client was promised. If the founder is rebuilding it, the SOP failed upstream.

⚡

THE LOOM TRICK THAT WRITES THE SOP FOR YOU

Open Loom. Do the task at normal speed while narrating every click. Stop. Paste the auto-transcript into ChatGPT or Claude with: **"Turn this into a numbered SOP with a checklist a new specialist can follow."** One recording replaces hours of live training, and now the process lives in the document, not your head.

5

MAKE RENEWALS STOP BEING A FIGHT

The Reporting SOP

Same day, monthly

OWNER Account Manager	TOOL Looker Studio / AgencyAnalytics	TRIGGER 1st business day, monthly
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THE REPORT THAT KEEPS THE RETAINER

The 14-page dashboard nobody opens is not a report. It is proof you were busy, not proof you made money. Lead with the one line that matters and send it the **same day every month** so the client can set their watch by it.

The One-Page Money Report

youragency.com · March

This month your marketing made you **\$48,200** and cost you **\$3,000**.
Net: \$45,200.

31 Qualified leads	\$96 Cost per acquisition	4.2x Return on ad spend	\$31K Pipeline added
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Next month: we're shifting [% of budget] from [channel] to [channel] to push CPA below [\$target].

STOP REPORTING ACTIVITY. REPORT THE OUTCOME.

STOP REPORTING (VANITY)	REPORT INSTEAD (OUTCOME)
× Impressions and reach × Posts published × Hours worked × Engagement rate	✓ Revenue attributed ✓ Qualified leads + CPA ✓ ROAS / pipeline added ✓ Money saved this month

✓ **DONE WHEN**
The client received a report led by a **dollar headline**, with 5 or fewer outcome KPIs and one "next month" line, on the same calendar day it goes out every month. If it has more than 5 KPIs, cut.

37%

of clients read the full report "most of the time," so the summary IS the report

1-5

KPIs is what 45% of clients actually want to see

2x

more likely to renew when clients get regular QBRs

Report-reading and KPI-count figures (AgencyAnalytics 2024 Benchmarks, 251 agencies; 75% prioritize conversion-driven metrics). QBR-to-renewal correlation (Staircase AI). Results are not typical.

6

THE EXIT THAT PAYS YOU TWICE

The Offboarding SOP

On notice + Day 90

OWNER

Account Manager

TOOL

CRM + Drive + Win-back automation

TRIGGER

Client gives notice

WHY MOST OWNERS LEAVE MONEY HERE

A client leaving feels like a loss, so owners go quiet, fumble the handoff, and never ask for anything. That is the single most wasteful moment in the agency. A clean exit gets you a testimonial, a referral, and a clear path back in 90 days, while a messy one gets you a bad review.

- ☐ **Run the exit call, don't email it.** "I want to make this handoff clean and learn what we could've done better. Got 15 minutes?" Find the real reason they're leaving. **AM**
- ☐ **Hand off every asset** from a checklist: logins, files, raw creative, reports, documentation. Transfer ownership of accounts you control. Leave them better than you found them.
- ☐ **Ask for the testimonial while the work is fresh.** "Would you be open to a 2-line note on the results we got? I'll draft it, you edit." Capture the specific numbers you delivered.
- ☐ **Ask for the referral.** "Who else do you know who's dealing with [the problem you solved]?" A happy exit is one of the warmest referral sources you'll ever get.
- ☐ **Set the 90-day win-back trigger.** Tag the client and schedule one honest check-in: "How's it going since we wrapped? No pitch, just checking in." Many clients leave, struggle, and come back if you keep the door open.



DONE WHEN

Assets are fully handed off, a testimonial and a referral ask are both logged in the CRM, and a dated **Day-90 win-back touch** is scheduled before the account is closed.

A client who leaves on good terms is your **cheapest next lead.**

THE COMPOUNDING POINT

These six SOPs are a chain, and offboarding loops it back to the start. A clean exit feeds testimonials into your **sales call**, referrals into your **lead-gen**, and win-backs into your **onboarding**. The agencies that keep clients 56 months instead of 24 are not lucky. They run the loop on purpose, every time, with or without the founder in the room.

THE BLANK SOP CANVAS

Now write your own.

One per process.

Copy this template into your tool of choice. Fill one out for every repeating process in your agency, not just the six in this library. Keep it to one page. If it spills onto two, you're describing, not instructing.

SOP: _____		Version 1 · Last updated ____ / ____
 Owner		
 Tool		
 Trigger		
 Steps	1. _____ 2. _____ 3. _____ 4. _____ 5. _____	
 Done When		

THREE RULES FOR WRITING ONE THAT STICKS

1 One screen

If a step needs a paragraph, it's two steps. Short lines a tired person can follow at 5pm.

2 Verbs, not vibes

Every step starts with a command verb. "Send the intake," not "the client should be onboarded."

3 Record it once

Loom the task, transcribe it, let AI draft the steps. Faster than writing from scratch and it captures the real flow.

**DO THIS IN ONE AFTERNOON**

Pick the process you're most sick of doing yourself. Open this canvas. Fill the four fields and the five steps. Hand it to one person and have them run it once while you watch. Fix what breaks. That's a working SOP, and you just bought back your week.

THE HONEST CATCH

SOPs on a page are easy. Running them **is the hard part.**

You now have six starting SOPs and a blank canvas. Here's the build order. But read the catch underneath it first, because it's the reason most owners stay stuck even with a folder full of documents.

- 1 Write the Sales Call SOP this week.** Fastest cash. The minute revenue stops depending on your mood, everything else gets easier to fund.
- 2 Lock the Lead-Gen rhythm.** A fixed weekly cadence so you never go heads-down and starve. Hold the 5-minute inbound SLA above all else.
- 3 Deploy Onboarding next.** It's the biggest churn lever. A Day-7 win and a Day-14 touch alone move your retention number.
- 4 Build the Fulfillment pipeline + QA gate.** Get work off your desk at your quality bar. Become the approver, not the rebuilder.
- 5 Standardize Reporting + Offboarding.** Prove the money monthly, then turn every exit into a testimonial, a referral, and a win-back.

WHY THE FOLDER OF SOPS ISN'T ENOUGH

Every SOP in here works. The reason most owners still don't escape is that **they're the bottleneck on writing, hiring for, and enforcing the system at the same time they're delivering for clients.** You document onboarding, then never hire the person to run it. You write the sales SOP, then take every call yourself. The documents aren't the missing piece. **The operator who installs and runs the whole chain with you is.**

The difference between a 3x and an 8-12x exit on \$300K of profit is roughly \$900K versus \$2.4M to \$3.6M. Process inefficiency drains an estimated 20 to 30% of agency revenue. Documented, transferable operations are what move an agency from "founder's job" to "sellable asset." Results are not typical.

A pile of SOPs is a manual. A team that runs them without you is a **business.**

• YOUR NEXT MOVE

You've got the SOPs. Let's install the whole machine with you.

Six checklists and a blank canvas are the easy half. The hard half is building the team, hiring for the roles, and running the whole chain every month while you're still delivering for clients, without becoming the bottleneck that breaks it. That's exactly what we install: **done-with-you, the entire system**, from the leads that fill the pipeline to the calls that close to the clients who stay.

And it's backed by the \$10,000 guarantee. **If we don't book you a set number of qualified calls in your first 90 days, we pay you \$10,000.** We can stand behind that because we own every link, not just hand you a PDF.

\$10K
GTD

Qualified calls in 90 days or we pay you **\$10,000**

Apply to AgencyGod →

Free 30-min strategy call · we onboard only a handful of agencies a month

agencygod.com