



AGENCY OPERATIONS

Agency SOP builder

A practical worksheet for turning a repeatable piece of work into an SOP that a teammate can actually follow and improve.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A process lives in one person's head and needs to become teachable.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Name the trigger**

- ☐ 02 **Define the outcome**

- ☐ 03 **List inputs and tools**

- ☐ 04 **Write the steps**

- ☐ 05 **Set quality checks**

- ☐ 06 **Assign an owner and review date**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.