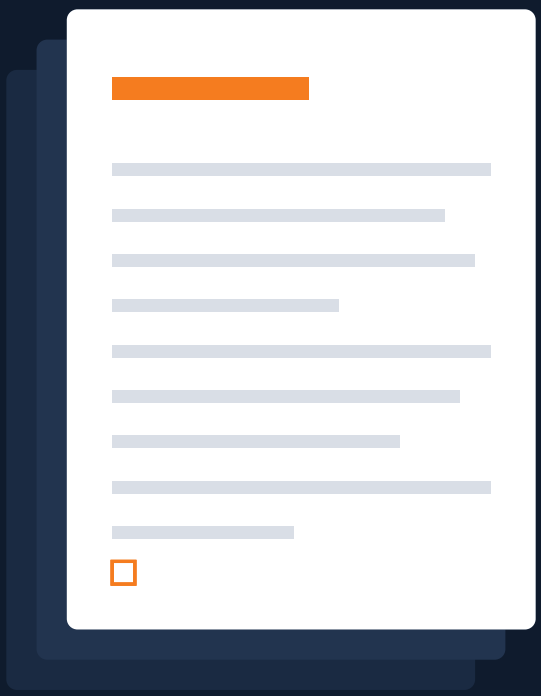
Documentation
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FREE TEMPLATE

BUSINESS DOCUMENTS

Standard Operating Procedure

A frontline procedure for tasks like client onboarding and support-ticket resolution.

INTENDED AUDIENCE

Frontline employees, Operators, Team leads

TYPICAL USE CASE

Client onboarding, support-ticket resolution

About this template

This business SOP is written for the people doing the work every day. It focuses on clear steps, who does what, the tools used, and what a good outcome looks like, with just enough control information to keep it current.

Detail	
Intended audience	Frontline employees, Operators, Team leads
Typical use case	Client onboarding, support-ticket resolution

How to use it

- Replace every *[grey bracketed placeholder]* with your own details.
- Delete the orange **Guidance** boxes and green **Example** boxes before you publish or circulate it.
- Add or remove table rows as needed; keep the section order so readers can find things quickly.

Document Control

SOP title		**SOP number**	
Revision		**Team**	
Owner		**Effective date**	
Next review date			

Version	Date	Author	Summary of changes
[1.0]	*[DD/MM/YYYY]*	*[Name]*	*[Initial release]*

01 Purpose & Outcome

GUIDANCE *What this procedure achieves and what 'done well' looks like.*

Purpose	
Successful outcome	*[e.g. Client live within 5 days, all accesses working]*
Trigger	*[What starts this procedure]*

02 Scope

Covers	Does not cover

03 Roles

Role	What they do
[Role]	

04 Tools & Templates

Tool / template	Used for	Link
[CRM]		

05 Procedure

GUIDANCE *Number every step, start with a verb, name the role, and note the output.*



#	Action	Responsible	Output / Record
1	*[Step]*	*[Role]*	*[Output]*
2			
3			
4			
5			
6			
7			
8			

06 Service Levels

Measure	Target
[First response]	*[< 4 business hours]*
[Resolution]	

07 Escalation

If...	Then escalate to	Within

08 FAQs & Tips

Question	Answer

09 Approval

GUIDANCE *Record who reviewed and approved this document.*

Role	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

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