



HA

HUNTER ADMIN

# Your First 5 SOPs

A Starter Template Pack for Small Business Owners

---

Systems separate a business that scales from one that stalls. These five templates cover the processes small teams need documented first - so you can hand things over without things falling through the cracks.

SOP 01

Inbox Management

SOP 02

Client Onboarding

SOP 03

Weekly Admin Round-Up

SOP 04

Social Media Scheduling

SOP 05

Invoice Chasing

[hunteradmin.org](https://hunteradmin.org) | [info@hunteradmin.org](mailto:info@hunteradmin.org)

Your Vision. Our Expertise. Real Growth.



# Inbox Management

Keep email under control and ensure nothing important is missed.

SOP OWNER: \_\_\_\_\_ VERSION: \_\_\_\_\_ LAST REVIEWED: \_\_\_\_\_

## PURPOSE

To ensure the business inbox is processed consistently, important messages are actioned promptly, and nothing falls through the cracks.

## FREQUENCY

Daily - morning and end of day

## TOOLS & SYSTEMS

Email client (Gmail / Outlook), task manager (e.g. Notion, Asana, Trello)

## STEP-BY-STEP PROCESS Tick each step on completion →

- 1 Open and scan inbox**   
Delete or archive anything that requires no action. Flag obvious spam.
- 2 Categorise remaining emails**   
Action Now / Delegate / Reply Later / File. Use folders or labels.
- 3 Reply to Action Now emails**   
Keep replies brief. If it takes under 2 minutes, do it immediately.
- 4 Create tasks for Delegate items**   
Add to task manager with owner and due date. Forward with a clear brief.

5

### File or snooze Reply Later emails

Snooze to a specific time. Do not leave them sitting in the inbox.



6

### End-of-day: inbox zero check

Aim for zero or near-zero. Anything left should be intentional.



7

### Flag urgent items for tomorrow

Add to tomorrow's priority list. Do not rely on memory.



#### ■ KEY RULE

Never leave an email unread without acting on it.  
Unread = unprocessed.

#### ↑ ESCALATION

If unsure whether to action or delegate, flag for review in the weekly check-in.

#### NOTES & ADDITIONAL CONTEXT

# Client Onboarding

Ensure every new client starts with a consistent, professional experience.

SOP OWNER: \_\_\_\_\_

VERSION: \_\_\_\_\_

LAST REVIEWED: \_\_\_\_\_

## PURPOSE

To deliver a smooth, professional onboarding for every new client - setting clear expectations, collecting required information, and starting the working relationship on the right foot.

## FREQUENCY

Every new client engagement

## TOOLS & SYSTEMS

CRM / client management system, contract tool (e.g. DocuSign), email, calendar

## STEP-BY-STEP PROCESS

Tick each step on completion →

1

### Send welcome email

Within 24hrs of agreement. Include next steps, timeline, and warm introduction.

2

### Issue contract and invoice

Send via your preferred contract tool. Set a 48hr signing deadline.

3

### Collect onboarding questionnaire

Send your onboarding form to gather key business info, logins, preferences.

4

### Schedule kickoff call

Book within the first 5 working days. Send agenda in advance.

5

### Set up client folder

Create shared folder: Comms / Assets / Deliverables / Finance.



6

### Add to project management tool

Create client workspace. Assign tasks, set first milestone date.



7

### Conduct kickoff call

Cover: goals, communication preferences, reporting, boundaries, next steps.



8

### Send kickoff summary

Email summary within 24hrs with agreed actions, dates, first check-in booked.



#### ■ KEY RULE

No work begins until contract is signed and first invoice is paid.

#### ↑ ESCALATION

If a client is unresponsive for 5 working days, escalate to the founder before proceeding.

#### NOTES & ADDITIONAL CONTEXT

---

---

---

---



# Weekly Admin Round-Up

Keep the back-end of the business tidy, up to date, and audit-ready.

SOP OWNER: \_\_\_\_\_ VERSION: \_\_\_\_\_ LAST REVIEWED: \_\_\_\_\_

### PURPOSE

To ensure all administrative tasks are completed on a consistent weekly cycle - keeping finances, communications, and records in good order without letting things pile up.

### FREQUENCY

Weekly - Friday afternoon recommended

### TOOLS & SYSTEMS

Accounting software (Xero / QuickBooks / FreeAgent), cloud storage, email, task manager

**STEP-BY-STEP PROCESS** Tick each step on completion →

- 1** **Review outstanding invoices**

Check all sent invoices. Flag anything overdue by 7+ days for chasing (see SOP 05).
- 2** **Reconcile business bank account**

Match transactions to invoices and expenses. Note anything unrecognised.
- 3** **Log and file receipts and expenses**

Upload all receipts to accounting software. Categorise correctly.
- 4** **Clear email backlog**

Process any emails not handled during the week. No loose ends.

5

### Update task manager

Close completed tasks. Move incomplete ones. Add anything new from the week.



6

### File documents

Save new documents (contracts, briefs, comms) to the correct client folder.



7

### Review next week's schedule

Check calendar, deadlines, and deliverables. Flag anything that needs prep.



#### ■ KEY RULE

This round-up should take no more than 60–90 minutes. If it's taking longer, processes need reviewing.

#### ↑ ESCALATION

Flag any unrecognised bank transactions or missing receipts to the founder immediately.

#### NOTES & ADDITIONAL CONTEXT

---

---

---

---

---



# Social Media Scheduling

Plan, prepare, and schedule content consistently across active channels.

SOP OWNER: \_\_\_\_\_ VERSION: \_\_\_\_\_ LAST REVIEWED: \_\_\_\_\_

## PURPOSE

To ensure social media content is created, approved, and scheduled in advance - maintaining a consistent presence without it eating into daily working time.

## FREQUENCY

Weekly - content scheduled 5–7 days in advance

## TOOLS & SYSTEMS

Buffer / Hootsuite / Later (or equivalent), Canva, Google Drive (content library)

## STEP-BY-STEP PROCESS Tick each step on completion →

- 1 Review content calendar**   
Check the upcoming week's planned posts. Note gaps or date-specific content.
- 2 Pull approved copy and assets**   
Retrieve from the shared content folder. Confirm all assets are final.
- 3 Create or resize graphics**   
Use Canva templates. Ensure sizing is correct per platform. Save to Drive.
- 4 Draft captions if needed**   
Follow brand voice guidelines. Include CTA and relevant hashtags.

5

### Submit for approval if required

Share draft posts with founder or client. Allow 24hr turnaround.



6

### Schedule all approved posts

Use scheduling tool. Double-check date, time, platform, and image.



7

### Confirm schedule is live

Preview scheduled queue. Screenshot or note confirmation for records.



#### ■ KEY RULE

Never post without approved copy and final assets. When in doubt, delay - don't publish unreviewed content.

#### ↑ ESCALATION

If approval hasn't come through 48hrs before a post is due, flag to the founder directly.

#### NOTES & ADDITIONAL CONTEXT

---

---

---

---

---



# Invoice Chasing

Follow up on overdue invoices promptly, professionally, and consistently.

SOP OWNER: \_\_\_\_\_ VERSION: \_\_\_\_\_ LAST REVIEWED: \_\_\_\_\_

### PURPOSE

To recover overdue payments in a timely, professional manner - protecting cash flow without damaging client relationships.

### FREQUENCY

As triggered - check outstanding invoices weekly (see SOP 03)

### TOOLS & SYSTEMS

Accounting software, email, phone (if required), invoice tracker

**STEP-BY-STEP PROCESS** Tick each step on completion →

- 1 Identify overdue invoices**

Any invoice unpaid 7+ days after the due date triggers this SOP. Log in tracker.
  
- 2 Send first reminder (Day 7)**

Polite email reminder. Attach original invoice. Reference the due date clearly.
  
- 3 Send second reminder (Day 14)**

Firmer tone. Note that payment is now 2 weeks overdue. Re-attach invoice.
  
- 4 Phone call follow-up (Day 21)**

Call the client directly. Keep it professional. Confirm they have the invoice.

5

### Send formal overdue notice (Day 28)

Reference payment terms from contract. State next steps if unpaid.



6

### Escalate to founder (Day 35+)

Do not proceed further without founder sign-off. Log all contact made.



7

### Update accounts on payment

Once paid, mark invoice settled in accounting software. Log in tracker.



#### ■ KEY RULE

Always attach the original invoice to every chase email. Never threaten action you're not prepared to follow through on.

#### ↑ ESCALATION

Anything beyond Day 28 must involve the founder before further action is taken.

#### NOTES & ADDITIONAL CONTEXT

---

---

---

---



**You've got your first five SOPs.**  
**What happens next is up to you.**

---

- Fill in the owner, version, and review date on each SOP.
- Share them with your team or VA so everyone's working from the same page.
- Review each one after 30 days - adjust anything that doesn't reflect reality.
- Build five more. The businesses that scale are the ones that document as they go.

**Ready for proper operational support?**

[hunteradmin.org](https://hunteradmin.org) | [info@hunteradmin.org](mailto:info@hunteradmin.org)