FREE MEMBER RESOURCE

THE AGENCY OPERATIONS GUIDE

Create your first SOP

A step-by-step playbook for HighLevel agencies — turn what's in your head into procedures your team can run without you.

SOP-001 · CLIENT ONBOARDING V1.0

- [x] Create sub-account
- [x] Deploy snapshot
- [x] Submit A2P registration
- [ ] Run test lead
- [ ] Schedule kickoff call

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Where HighLevel agencies get unstuck.
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INTRODUCTION

Your agency runs on what's in your head. That's the problem

Every HighLevel agency hits the same wall. You can build the funnels, deploy the snapshots and onboard the clients — but only if *you* do it. The moment you hire, hand off fulfillment or take a week off, quality wobbles. Clients notice.

The fix isn't working harder. It's a standard operating procedure: a written, repeatable version of the thing you already do well. One SOP for client onboarding means every new sub-account gets set up the same way, whether it's you or your newest VA doing it. One SOP for monthly reporting means no client ever gets a half-finished dashboard.

This guide walks you through creating your first SOP in seven steps, with agency-specific examples throughout — snapshot deployment, sub-account setup, campaign launches and client onboarding. It ends with a chapter most SOP guides can't offer: how to make HighLevel itself enforce your procedures, so the SOP isn't a document people forget — it's the way the platform works.

WHAT'S INSIDE

CHAPTER 01

Pick the right process to document

Don't start with everything. Start with the one process that costs you the most when it goes wrong. For most agencies, that's one of these five:

- **Client onboarding** — sub-account creation, snapshot deployment, domain and A2P setup, kickoff call
- **Snapshot deployment** — loading, customizing and testing a snapshot for a new client's niche
- **Campaign launch** — funnel QA, workflow activation, tracking setup, go-live checks
- **Monthly reporting** — pulling attribution data, building the report, the client call
- **Support triage** — who handles what, response times, escalation paths

Selection criteria

Score each candidate against five factors:

- **Client impact** — does this process directly touch what clients see and pay for?
- **Frequency** — how often does someone run it? Weekly beats quarterly.
- **Error rate** — where do mistakes keep happening? Missed DNS records, broken workflow triggers, forgotten calendar syncs.
- **Training time** — what takes longest to teach a new hire or VA?
- **Compliance** — A2P 10DLC registration, consent capture and unsubscribe handling have rules. Get them wrong and your numbers get blocked.

Process selection scorecard

Score each process 1 (low) to 5 (high). Document the highest total first.

PROCESS	CLIENT IMPACT	FREQUENCY	ERROR RATE	TRAINING TIME	TOTAL
e.g. Client onboarding	5	4	4	5	**18**

CHAPTER 02

Define scope and purpose

An SOP without boundaries grows until nobody reads it. Before you write a single step, pin down what it covers, who runs it and why it exists.

Write the purpose statement

One short paragraph answering three questions: what does this SOP achieve, who uses it and why does it matter?

> EXAMPLE — CLIENT ONBOARDING SOP
>
> "This SOP ensures every new client is live in HighLevel within five business days of signing. It guides the onboarding specialist from signed agreement through sub-account setup, snapshot deployment, A2P registration and kickoff call, so no client's first impression depends on who happened to onboard them."

Set the boundaries

- **Start point:** the exact trigger. "Signed agreement lands in the Closed Won pipeline stage."
- **End point:** the exact finish line. "Kickoff call complete and client marked Active."
- **Roles involved:** who executes, who approves, who gets notified.
- **Explicitly out of scope:** name what this SOP does *not* cover — e.g. "custom development requests follow the change-order SOP." This is the line that keeps documents from bloating.
- **Prerequisites:** what must already exist — the niche snapshot, the client's domain access, billing set up in SaaS mode.

CHAPTER 03

Gather what the process needs

Half the friction in any handoff is access. Your VA can't deploy a snapshot they can't reach, and a new hire shouldn't be hunting for the Twilio login on day one. List every tool, credential and reference the process touches — before you write the steps.

Resource inventory

CATEGORY	TYPICAL ITEMS FOR AN AGENCY	YOURS
Platform access	Agency-level HighLevel login, correct team role and sub-account permissions	
Assets	Niche snapshot, funnel templates, email/SMS templates, brand kit	
Integrations	Stripe, Twilio/LC Phone, Mailgun/LC Email, Google Business Profile, Facebook	
Client inputs	Domain/DNS access, logo and brand assets, business info for A2P, calendar availability	
Reference docs	Pricing sheet, service agreement, escalation contacts, HighLevel help docs links	

Store credentials in a password manager and reference it in the SOP — never paste passwords into the document itself. If a step needs an access level your team doesn't have, fix the permission now; an SOP that starts with "ask Charles for the login" isn't an SOP.

CHAPTER 04

Write the step-by-step instructions

Write for the person who has never done this before. Your test reader is the VA you'll hire next quarter, not the you who built the process.

Writing rules

- One action per step. "Load the snapshot, then customize the workflows" is two steps.
- Active voice, imperative mood: "Click Sub-Accounts → Create Sub-Account", not "the sub-account should be created."
- Use HighLevel's exact menu labels. If the button says "Load Snapshot", the step says "Load Snapshot".
- Screenshot anything with more than three clicks. A picture of the settings panel beats a paragraph describing it.
- Name the decision points: "If the client already has a Twilio account, skip to step 9."

The three-part structure

1 — PREPARE

Prerequisites confirmed, access verified, client inputs collected. Nothing starts until this list is green.

2 — EXECUTE

Numbered steps in order, with decision points and quality checks built in where errors actually happen.

3 — CONFIRM

Verification steps, what to log, who to notify. The process isn't done until it's confirmed done.

Pick the right format

- **Checklist** — for linear tasks with no branching, like a funnel go-live QA pass.
- **Hierarchical steps** — for processes with sub-tasks, like full client onboarding.
- **Flowchart** — for branching processes, like support triage or A2P registration paths.
- **Screen recording + checklist** — the agency sweet spot. Record yourself doing it once in Loom, then write the checklist that goes with it.

CHAPTER 05

Build in quality control

A step done isn't a step done right. For each critical step, define what gets checked, how and what happens when the check fails. In an agency, the checks that matter are the ones a client would otherwise find for you.

Quality checkpoint template

STEP	CHECK	STANDARD	IF IT FAILS
Snapshot deployed	Every workflow published, no draft triggers	0 drafts in Workflows list	Publish or delete before handoff
Domain connected	DNS propagated, SSL active	Funnel loads on https	Re-check records, wait, escalate at 24h
A2P registered	Campaign approved	Status: Approved	No SMS sends until approved
Test lead run	Form → automation → notification fires	Lead appears, emails send, staff notified	Trace the workflow, fix, re-test

Three checkpoints per SOP is plenty to start. Put them where mistakes have actually happened — your support inbox is a map of where the checks belong.

Test and refine

An SOP you wrote but never tested is a guess. The test is simple: hand it to someone who's never done the process and watch them run it in a test sub-account. Don't help. Every time they pause, ask a question or improvise, you've found a gap in the document — not in them.

The test protocol

1. **Self-review first.** Run the SOP yourself, following it literally. If step 6 says "configure the calendar" and you had to make four decisions to do it, split it.
2. **Fresh-eyes test.** Pick the least-experienced person available. Set up a sandbox sub-account so mistakes are free. Time the run.
3. **Capture everything.** Note every hesitation, question and workaround. Ask them to mark unclear steps directly in the document.
4. **Revise and re-test.** Fix the gaps, then have a second person run the revised version. Two clean runs means it's ready.

Test feedback log

ASPECT	FEEDBACK	ACTION
Clarity		
Completeness		
Time required		
Issues hit		

CHAPTER 07

Roll out and train your team

A finished SOP that lives in a folder nobody opens changes nothing. Rollout is three moves: announce it, train on it, then hold the line.

1. **Announce with a date.** "From Monday, all onboarding follows this SOP." Post it where your team already works — Slack, your internal HighLevel community or your project board.
2. **Train hands-on.** Walk through it once together, then have each person run it solo in a sandbox sub-account. Watching is not training; doing is.
3. **Hold the line for 30 days.** When someone skips the SOP and freelances, redirect them to it — even when their way worked. Consistency is the whole point. Track adherence, collect friction reports and fold real improvements into the next version.

Version the document. Date each revision, note what changed and keep one canonical copy — the fastest way to kill trust in SOPs is two versions in circulation.

> OPERATOR'S NOTE
>
> The first week after rollout, mistakes may go *up* — people are learning a documented way instead of their own way. That's normal. Judge the SOP at day 30, not day 3.

CHAPTER 08

Make HighLevel enforce your SOPs

Here's the agency advantage most SOP guides miss: you run your business on a platform that can execute procedures for you. The best SOP isn't a document someone remembers to follow — it's a system that won't let them skip steps.

Four ways to build SOPs into the platform

- **Snapshots are executable SOPs.** Every workflow, pipeline, funnel and custom field you standardize in your master snapshot deploys identically to every client. Your "campaign setup SOP" becomes a two-minute snapshot load instead of a 40-step manual document. When you improve the process, update the snapshot — the SOP ships itself.
- **Workflows enforce sequence.** Build an internal onboarding workflow: signed agreement moves the opportunity to Closed Won, which triggers task assignments in order — create sub-account, deploy snapshot, submit A2P, schedule kickoff. Nobody has to remember step 4; the workflow assigns it and chases it.
- **Pipelines make progress visible.** An "Onboarding" pipeline with one stage per SOP phase shows you exactly which client is stuck where — and a stale card is an early warning, not a surprise churn call.
- **Custom fields capture the checks.** Add fields like "A2P status" or "QA passed" and require them before a stage move. The quality checkpoint from chapter 5 stops being a suggestion.

> RULE OF THUMB
>
> Document the process first, automate it second. A workflow built from a tested SOP encodes a good process; a workflow built from memory encodes your bad habits at scale.

YOUR FIRST WEEK

The five-day action plan

One process, one week, roughly an hour a day. Here's the schedule:

DAY 1

Select the process

Complete the scorecard from chapter 1. Pick the winner. Gather your resource inventory.

DAY 2–3

Document

Write the purpose and scope, then the step-by-step instructions. Record a Loom of yourself doing the process once. Add quality checkpoints where errors have happened before.

DAY 4

Test

Fresh-eyes run in a sandbox sub-account. Log the feedback, fix the gaps, re-test the fixes.

DAY 5

Roll out

Finalize the document, announce the start date, run the hands-on training. Set a 30-day review date.

When it gets hard

- **Too much detail?** Document the core path first; move edge cases to an appendix.
- **Team resists documenting?** Start where the pain is loudest — the process that generated last month's client complaint.
- **SOPs drift apart in style?** Make your first SOP the template for every SOP after it.
- **No time?** That's the tell you need this most. An hour a day for five days buys back hours every week after.

CONCLUSION

Your agency shouldn’t need you in every sub-account

One documented process is the difference between an agency that scales and a freelancer with a team. Start with your highest-impact process, keep the steps literal, test with fresh eyes and let HighLevel enforce the rest.

Pick your first process today. Five days from now, it runs without you.