



FREE GUIDE

Role SOP Pack

Four working standard operating procedures for the virtual roles most agencies hire first: telemarketer, service VA, social media manager, and executive assistant. Each one gives the role a purpose, a daily rhythm, a checklist, escalation rules, KPIs, and an end of day report template. These match how the IntegrationOps Academy trains these roles, so a hire can read the SOP and start.

How to use this

- Hand the SOP to the hire on day one and have them rewrite it in their own words.
- Publish the end of day report template where the whole team can see it.
- Review the KPIs weekly. A number nobody looks at stops being true within a month.
- Change anything that does not fit your agency, then hold the role to your version.

What is in here

Role	The one thing this role owns
Telemarketer	Turn a list into booked appointments, and give the agency an honest daily read on outbound activity.
Service VA	Own the service queue so clients get an answer fast and producers stay on new business.
Social media manager	Keep the agency visible and credible in its market, and make the results measurable.
Executive assistant	Protect the owner's calendar and make sure nothing agreed in a meeting quietly dies.

Carrier neutral by design. Adapt names, hours, and thresholds to your agency, then hold the role to the version you published.

ROLE SOP

Telemarketer

Purpose. Turn a list into booked appointments, and give the agency an honest daily read on outbound activity.

Daily rhythm

When	What happens
First 30 minutes	Review yesterday's callbacks, confirm today's list, check appointment calendar for open slots.
Block 1	Outbound dials on the primary campaign. No email, no admin work inside the block.
Midday	Log outcomes, send confirmations for anything booked, reset the list.
Block 2	Second dial block, callbacks and warm follow ups first.
Last 30 minutes	End of day report submitted. Tomorrow's list staged.

Daily checklist

- Every contact logged in the CRM the same day, no exceptions.
- Every booked appointment has a confirmation sent and a reminder scheduled.
- Every no answer has a next attempt scheduled, not left open.
- Do not call list respected and updated immediately on request.
- Scripts followed as written until a change is approved.

Escalation rules

- Any complaint, threat to report, or request to stop contact: stop and notify the owner same day.
- A prospect with an active claim or coverage question: hand to service, do not answer it.
- Data that looks wrong across many records: pause the campaign and flag it.

KPIs

KPI	Why it is on the list
Dials per day	Volume actually attempted
Contacts per day	Live conversations reached
Appointments set	The number the role exists for
Set to kept rate	Quality of the appointment, not just the count
Contact to set rate	Script and list effectiveness

End of day report template

Five lines, same order, every day, in the same place.

1. Dials, contacts, appointments set.
2. Appointments kept from prior days.
3. Best objection heard today and how it was handled.
4. List or data problems.
5. One thing that would make tomorrow better.

ROLE SOP

Service VA

Purpose. Own the service queue so clients get an answer fast and producers stay on new business.

Daily rhythm

When	What happens
First 30 minutes	Triage the queue by urgency, flag anything aged past the standard.
Morning block	Endorsements, certificates, billing questions, carrier follow ups.
Midday	Callbacks and outbound updates on anything waiting on a carrier.
Afternoon block	Clear new items, revisit anything still open from yesterday.
Last 30 minutes	Queue count reconciled, end of day report submitted.

Daily checklist

- Every request acknowledged within the published response standard.
- Every item documented in the client record, not in an inbox.
- Nothing sits over 48 hours without a status update to the client.
- Carrier confirmations attached before an item is closed.
- Aged items reviewed and escalated, not quietly carried forward.

Escalation rules

- Any coverage advice question goes to a licensed producer, always.
- Claims with injury, litigation, or a large loss go straight to the owner.
- Cancellation or non renewal notices: same day escalation with the client's history attached.

KPIs

KPI	Why it is on the list
Items closed per day	Throughput
Average first response time	The client's actual experience
Aged items over 48 hours	Backlog health
Reopen rate	Whether it was really finished
Retention touches completed	Service turning into renewal

End of day report template

Five lines, same order, every day, in the same place.

1. Items in, items closed, items open.
2. Anything aged past the standard, with a reason.
3. Escalations raised and where they landed.
4. Carrier delays worth knowing about.
5. One process fix worth making.

ROLE SOP

Social media manager

Purpose. Keep the agency visible and credible in its market, and make the results measurable.

Daily rhythm

When	What happens
First 30 minutes	Check comments, messages, and reviews. Respond or route.
Content block	Produce or schedule against the published calendar.
Midday	Community engagement: local pages, partners, referral sources.
Afternoon	Review requests to eligible clients, follow up on unanswered ones.
Last 30 minutes	Log what published and what performed. End of day report.

Daily checklist

- Calendar filled at least two weeks ahead.
- No client detail, policy detail, or claim detail in any post.
- Every comment and message answered within one business day.
- Review requests sent to a defined list, never mass blasted.
- Any compliance sensitive wording approved before it publishes.

Escalation rules

- A negative public review or complaint: notify the owner before responding.
- Anything that reads as a coverage promise: hold it and get approval.
- A message that is actually a service or claim request: route to service the same day.

KPIs

KPI	Why it is on the list
Posts published vs planned	Consistency
Engagement rate	Whether the content lands
New reviews per month	Trust that compounds
Inbound messages routed	Social producing real conversations
Leads attributed	Business, not vanity metrics

End of day report template

Five lines, same order, every day, in the same place.

1. What published today.
2. Engagement and any standout post.
3. Reviews requested and received.
4. Messages routed to service or sales.
5. What is queued for tomorrow.

ROLE SOP

Executive assistant

Purpose. Protect the owner's calendar and make sure nothing agreed in a meeting quietly dies.

Daily rhythm

When	What happens
First 30 minutes	Calendar review, conflicts resolved, prep pulled for every meeting.
Morning block	Inbox triage, follow ups on open commitments, vendor chasing.
Midday	Collect team reports, assemble the rollup.
Afternoon	Meeting notes distributed with owners and dates on every action.
Last 30 minutes	Tomorrow staged. End of day report submitted.

Daily checklist

- Every meeting has an agenda before it starts.
- Every action item has one owner and one date.
- Nothing on the follow up list goes untouched for a week.
- Weekly rollup delivered on the same day and time every week.
- Owner's deep work blocks defended unless the owner releases them.

Escalation rules

- A commitment slipping a second time: raise it, do not absorb it.
- Anything involving money, contracts, or licensing goes to the owner.
- Team conflict or performance concerns: report, do not mediate.

KPIs

KPI	Why it is on the list
Commitments closed on time	The core of the role
Reports collected on schedule	Rhythm holding
Owner hours protected	Calendar discipline
Meetings with an agenda	Preparation, not improvisation
Aged follow ups	Nothing rotting quietly

End of day report template

Five lines, same order, every day, in the same place.

1. Commitments closed and commitments slipping.
2. Tomorrow's calendar with anything needing a decision flagged.
3. Reports received and reports missing.
4. Vendor or external items waiting.
5. One thing the owner should look at first tomorrow.