

AI-Powered SOP Template Pack

10 Standard Operating Procedure Templates Optimized for AI

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About These Templates

These SOP templates are designed to be readable by both humans and AI agents. Each follows a consistent structure that makes them easy to automate, reference, and maintain. Use the format below for any SOP in your organization.

Universal SOP Format

Every SOP should include these sections:

1. **TITLE:** Clear, descriptive name
2. **PURPOSE:** Why this process exists (1-2 sentences)
3. **SCOPE:** Who does this, when, and for what
4. **TOOLS REQUIRED:** Software, accounts, access needed
5. **PREREQUISITES:** What must be true before starting
6. **STEPS:** Numbered, specific, actionable
7. **QUALITY CHECKLIST:** How to verify the output
8. **EXCEPTIONS:** When to deviate from the standard process
9. **ESCALATION:** When and how to escalate issues
10. **REVISION HISTORY:** Date, author, what changed

Template 1: Customer Onboarding SOP

PURPOSE: Ensure every new customer has a consistent, thorough onboarding experience.

SCOPE: Account managers, triggered when a new deal closes.

TOOLS: CRM, email, project management tool, knowledge base.

STEPS:

1. Create customer record in CRM with all deal details
2. Send welcome email using Template A within 24 hours
3. Schedule kickoff call within 5 business days
4. Prepare kickoff deck with customer-specific details
5. Conduct kickoff call (45 min) using standard agenda
6. Send follow-up email with action items within 2 hours
7. Create customer project in PM tool with standard milestones
8. Add customer to monthly check-in calendar

QUALITY CHECKLIST:

- & Welcome email sent within 24 hrs
- & Kickoff scheduled within 5 days
- & All customer data in CRM is complete
- & Project created with correct milestones

Template 2: Content Publishing SOP

PURPOSE: Maintain consistent quality and schedule for all published content.

SCOPE: Marketing team, weekly cadence.

STEPS:

1. Draft content using brand voice guidelines and approved outline
2. Run through AI grammar and style check (Grammarly)
3. Peer review by one team member (24-hour turnaround)
4. Add images, formatting, and internal links
5. SEO optimization: meta title, description, alt tags, keywords
6. Schedule in CMS for approved publish date
7. Prepare social media posts for distribution
8. Publish and verify all links and formatting
9. Share in team Slack channel
10. Add to content calendar as 'published'

Additional Templates Included

- Template 3: Sales Lead Qualification SOP
- Template 4: Support Ticket Resolution SOP
- Template 5: Monthly Financial Close SOP
- Template 6: Employee Onboarding SOP
- Template 7: Vendor Evaluation SOP
- Template 8: Incident Response SOP
- Template 9: Product Release SOP
- Template 10: Quarterly Business Review SOP

Each template follows the universal format above. Customize the steps, tools, and checklists for your specific business. The consistent structure ensures any SOP can be understood by AI agents and automated over time.

About the Author

Justin P. Barrett is an entrepreneur, artist, and author. As CEO of Eyesafe, he built the global standard for display health technology. As founder of Alive LLC, he helps lean teams implement AI systems that actually work — agent architectures, knowledge bases, and automation workflows.

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