

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

To make sure every piece of work is checked against the brief and the agency's standard before a client sees it, and that each client approval is clear and recorded.

Scope

All client deliverables, such as designs, copy, ads, videos, websites and reports. It applies to everyone who makes, reviews or presents work, including freelancers.

Responsibilities

Role	Responsibility
Maker	Produces the work to the brief, checks it against the brief and the QA list, and fixes what the reviewer finds.
Reviewer	A creative director, senior or second person who reviews the work before it goes to the client, and approves it or sends it back.
Account manager	Presents the work, gathers the client's feedback in one place, manages the agreed rounds, and records the final approval.

Definitions

Feedback round: One set of consolidated client comments on a version of the work, and the revision that follows. The contract or statement of work sets how many are included.

Change request: A request that goes beyond the brief or the included rounds, which is quoted before the work is done.

What you need

- The approved brief for the job
- The agency's QA list for that type of work
- A shared place for versions, comments and approvals

Procedure

1. Start from the brief

Confirm the brief is approved before work starts, with the goal, audience, message, formats, sizes and deadline.

2. Self-check

The maker checks the work against the brief and the QA list, including spelling, brand guidelines, sizes, links and legal lines, before asking for a review.

3. Internal review

The reviewer checks the work against the brief and the agency's standard, and approves it or sends it back with clear comments. Nobody reviews their own work.

Caution: Never send work to a client that hasn't passed internal review, even when the deadline is close. Tell the client about the delay instead.

4. Present to the client

The account manager presents the work with the reasoning behind it, and tells the client what kind of feedback is needed and by when.

5. Gather feedback

Ask for one set of consolidated comments from the client's approver. Check each comment against the brief, and agree which changes are in scope.

- Flag any change outside the brief as a change request, with a quote, before doing it
- Record which feedback round this is

6. Revise and recheck

The maker revises the work, and the reviewer checks the changes before the new version goes back to the client.

7. Get final approval

Get the client's approval in writing, by email or in the approval tool, naming the exact version approved.

8. Release and file

Release or publish only the approved version, and file it with the brief, feedback and approval.

Records

- The approved brief for each job.
- Each version, with internal review comments and who approved it.
- Client feedback for each round, and any change requests and quotes.
- The client's written final approval, naming the version.

Related documents

- Website launch checklist
- Agency client onboarding checklist
- Complaint handling procedure

Revision history

Version	Date	What changed	Approved by