Tempest Consulting

2025 Edition

Standard Operating Procedures

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Version #: 1
Owner:

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Table of Contents

Using the style guide headers will also allow you to create an auto-table of contents by clicking 'References' from the MSWord menu bar.

Right click and click 'Update Field' to refresh.

Start Here!

This template was designed to be customized by the new owner. This same template can be used over and over again for different types of documents just by updating a few key fields.

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In certain areas through this document, you will see text boxes and call outs, like this one and the one in the header above providing some tips, tricks, guidance and suggestions to help you out. Simply delete these callouts and text boxes (like this) that contain instructions prior to finalizing your document. If you purchased the premium version of this template, you will also have access to a video explaining how to update and customize each section of this document.

All sections in this document are editable. Utilizing the Style guide above for headers and the Design table for overall color selection can really help maintain your professional look.

For additional training and instruction, you may want to consider our interactive, self-paced, 4 hour deep dive course, Policies and Procedures Made Simple.

Introduction

Customize your title's by using the pre set "Styles" you can select in the "Home" tab in the menu bar above.

Welcome to the Operations Manual for … to the policies, procedures, and practices that govern our daily … onal services. It is designed to provide clarity, consistency, and structure, ensuring that all team members are equipped to perform their roles effectively while upholding the standards that define our company.

At Tempest, we pride ourselves on delivering tailored solutions that drive success for our clients. This manual reflects our commitment to excellence, collaboration, and continuous improvement, providing a framework that supports our mission and core values.

The purpose of this Operations Manual is to:

- Establish clear policies and procedures for all areas of our business.
- Promote efficient and effective operations across departments.
- Support consistent delivery of high-quality services to our clients.
- Serve as a reference for training, decision-making, and troubleshooting.

Who Should Use This Manual

This manual is intended for all team members, from consultants to administrative staff, as well as any stakeholders who may need insight into our operational processes. Whether you are new to the team or a seasoned professional, this document is a valuable resource for understanding how we work and ensuring alignment with our standards.

Core Sections

The manual is organized into sections, each addressing a critical aspect of our operations, including but not limited to:

- Team responsibilities
- Data security and confidentiality policy
- Client engagement and project management
- Internal communication protocols
- Financial and administrative procedures

Commitment to Excellence

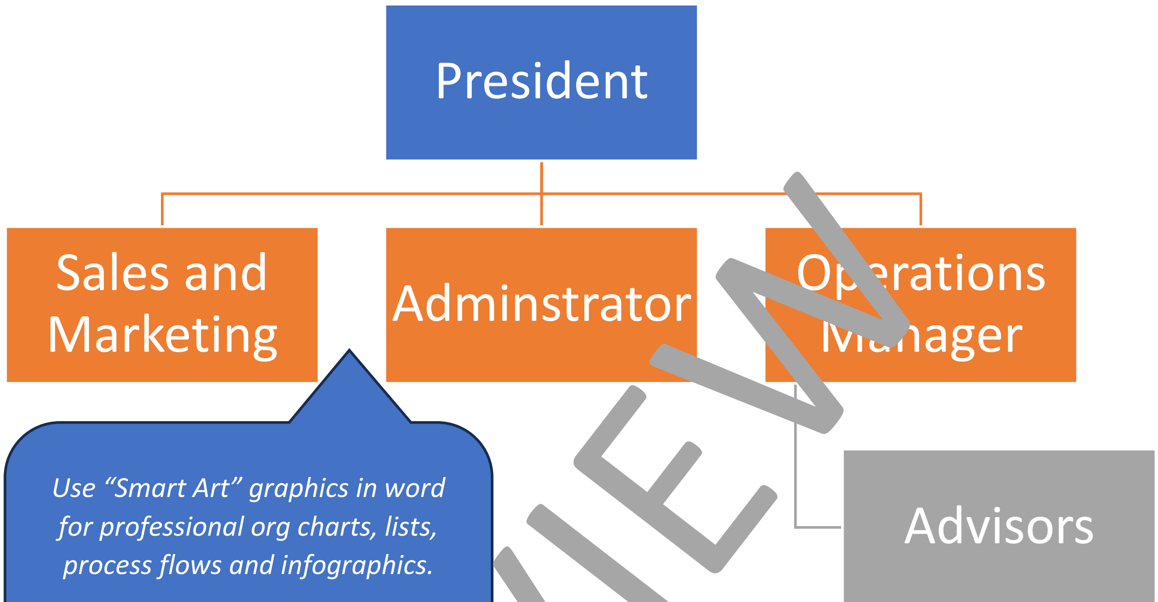
By adhering to the guidelines and processes outlined in this manual, we ensure that [Your Consulting Company Name] continues to set the benchmark for consulting services in our industry. Your role in following and contributing to these standards is vital to our shared success.

Thank you for your dedication to our mission and your commitment to excellence. Let this manual be your guide as we work together to achieve outstanding results for our clients and our company.

Sincerely,
Andy Ziegler
CEO, Tempest

Roles and Responsibilities

Organizational Structure



Use "Smart Art" graphics in word for professional org charts, lists, process flows and infographics.

PRO TIP: You can customize the color of SmartArt graphics as well.

Job Descriptions:

CEO

Responsibilities

- **Strategic Leadership:** Develop and implement the company's vision, mission, and long-term strategic goals to ensure sustained growth and market leadership.
- **Client Relationship Management:** Cultivate and maintain strong relationships with clients, fostering trust and driving repeat business opportunities.
- **Business Development:** Identify and [illegible] new market[illegible] Tempest's services and client base.
- **Financial Oversight:** Manage the company's fina[illegible] forecasting, and ensuring profitability.
- **Team Development:** Lead, mentor, and inspire the executiv[illegible] potential and align with company objectives.
- **Operational Excellence:** Ensure the smooth execution of all [illegible] efficient processes and systems.
- **Market Positioning:** Represent Tempest as the face of the c[illegible] presence through networking, public speaking, and industry [illegible]
- **Innovation and Growth:** Drive the development of innovative [illegible] evolving client needs.
- **Compliance and Risk Management:** Oversee compliance with all legal, ethical, and regulatory standards to safeguard the company's reputation.
- **Performance Monitoring:** Set and evaluate performance metrics to ensure alignment with strategic goals and continuous improvement.

> *Customize all of your companies job descriptions. It is fine to start out with something short and sweet and add or build on it over time.*
>
> *It is also ok for the same person to have multiple roles/titles, especially in the early stages of a new business.* 😊

Qualifications

1. **Experience:** Minimum of 10 years in leadership roles within the consulting or related industry, with a proven track record of success.
2. **Education:** Bachelor's degree in Business Administration, Management, or related field (MBA preferred).
3. **Skills:** Exceptional strategic planning, business development, and financial management abilities.
4. **Leadership:** Strong leadership, communication, and interpersonal skills with the ability to inspire and influence diverse teams.
5. **Industry Knowledge:** In-depth understanding of business consulting practices, market trends, and client relationship management.

Marketing Manager

Responsibilities

- **Strategic Marketing Planning:** Develop and execute comprehensive marketing strategies that align with Tempest's goals and drive business growth.
- **Brand Management:** Oversee the development and consistency of Tempest's brand identity across all marketing channels.
- **Content Creation:** Lead the creation of high-quality, engaging content, including blogs, case studies, and white papers, to establish Tempest as an industry thought leader.
- **Digital Marketing:** Manage digital campaigns, including SEO, PPC, email marketing, and social media, to increase brand visibility and client engagement.
- **Market Research:** Conduct market analysis to identify trends, client needs, and competitor strategies to inform marketing efforts.
- **Client Outreach:** Develop and implement targeted campaigns to attract new clients and nurture existing relationships.
- **Event Coordination:** Plan and execute industry events, webinars, and networking opportunities to promote Tempest's services.
- **Performance Analytics:** Monitor and analyze marketing performance metrics, providing actionable insights to optimize campaigns.
- **Collaboration:** Work closely with the sales and consulting teams to align marketing initiatives with business development objectives.
- **Budget Management:** Oversee the marketing budget to ensure efficient allocation of resources and maximum ROI.

Qualifications

1. **Experience:** Minimum of 5 years in marketing, preferably within consulting or professional services industries.
2. **Education:** Bachelor's degree in Marketing, Communications, or a related field (MBA or advanced certifications are a plus).
3. **Skills:** Strong expertise in digital marketing tools, analytics platforms, and CRM software.
4. **Creativity:** Proven ability to create compelling campaigns and innovative strategies that drive engagement.
5. **Collaboration:** Excellent communication and teamwork skills to effectively partner with internal Standard Operating Procedures

Standard Operating Procedure			
Company Name:	**Tempest**		
Version #	1	**Revision Date**	1/1/2025

An optional header like this can help you stay organized, but it is not necessary.

Information headers like this are often required in technical and regulated companies.

Client engagement and project management

Clients are the lifeline of our business, and exceptional service is non-n… This section of the Standard Operating Procedures focuses on our clients, how we i… them with services and products.

Section Outline

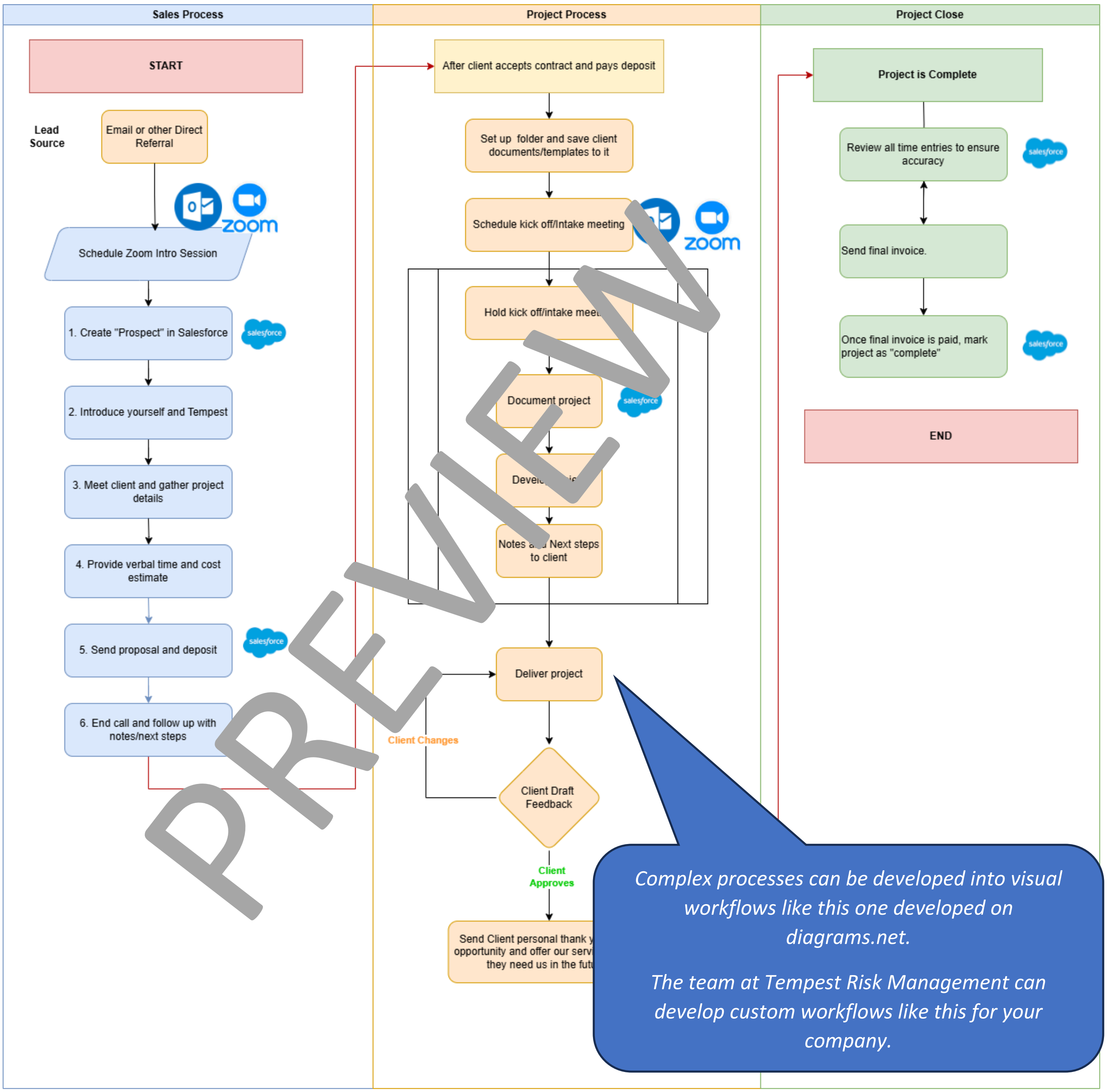
- Lead Sources
- Client Engagement Procedure Overview
- Introduction meeting
- Review products and services
- Contract negotiation and offer
- Project Execution
- Project Close
- Communication Guidelines

10 Key Customer Service Standards

1. **Timely Responses** – Address client inquiries within 24 hours and provide regular updates.
2. **Professionalism** – Maintain a courteous and professional demeanor in all interactions.
3. **Clear Communication** – Use concise, jargon-free language and document key discussions.
4. **Customized Solutions** – Tailor services to meet each client's unique needs and goals.
5. **Quality Deliverables** – Ensure all work is accurate, detailed, and meets agreed standards.
6. **Integrity and Confidentiality** – Uphold ethical practices and protect client information.
7. **Follow-Up Support** – Conduct follow-ups to ensure satisfaction and address concerns.
8. **Prompt Problem Resolution** – Resolve complaints efficiently with actionable solutions.
9. **Empathy and Understanding** – Show genuine interest in client challenges and goals.
10. **Proactive Engagement** – Offer industry insights and regularly identify new opportunities.

Client Engagement Procedure Overview

1. Initial engagement
2. Introduction Meeting
3. Project Execution
4. Project Close



1. Initial engagement

1. Initial Contact
    a. Identify potential clients through referrals, research, or networking.
    b. Collect their contact information (email, phone, etc.).
    c. Draft a profess[...]and personalized email or message tailored to the client's industry and potential needs.
    d. Send the Initial Email
    e. Use a clear subject line like "Introdu[...] Goals."
    f. Introduce yourself, mention how you found the[...] meeting.
2. Follow-Up on Initial Contact
    a. If there's no response within 3 business days, s[...]
    b. Emphasize your interest in discussing how you c[...]
3. Schedule the Meeting
    a. Use a scheduling tool (e.g., Calendly) to make it easy for the client to choose a convenient time.
    b. Confirm the date, time, and format (e.g., Zoom, in-person).
    c. Email a calendar invite with the meeting details, agenda, and a brief company overview document.
4. Research the Client. Review the client's industry, competitors, and potential pain points to tailor your approach.
5. Prepare for the meeting
    a. Develop a presentation or talking points about your services and their benefits.
    b. Create a checklist of questions to uncover the client's specific needs.
    c. Conduct a Test Run
    d. Test the video conferencing software or meeting set[...]
    e. Send a Reminder
    f. Email or text the client a day before the meeting to c[...] final details.

Customize step by step procedures for all of your company operations.

PRO TIP: Keep it Consistent. Use numbers for step by step "procedures" and bullets for "policies" or lists.

Pasting in images will give your document a professional and engaging look and feel.

PRO TIP: Copy images from your website. Re-use materials that you already have developed.