Name of Procedure	Project Briefs
Policy Statement	This SOP will outline guidelines for client project and task setup
Frequency of Use	Every time you set up a new task or project requiring a brief

Purpose

In creating project briefs for all new client tasks we achieve:

- Improving communication and expectations with clients
- Having a central point of information for internal team
- Ensuring we have all information needed to undertake the task
- Client approval
- Clear understanding of the client's desired outcome
- Improving our service to clients
- Reduces email communications between lead VA, team and client
- Encourages the client (and ourselves) to think more strategically, detailed and outcome focused.
- Forms a basis for the SOP to be created.

Policy:

It is our policy as of 1st September 2017 that any task communicated by a client requiring a project brief shall have one created and signed off by the client. This brief will be filed in Google Drive – Client – Project Briefs and the shareable (editable) link hyperlinked in the relevant task 'information' in ProWorkFlow.

Responsibility

The Lead VA is responsible for all project briefs being executed, authorized by the client and updated as required.

Prerequisites

You will need the following to complete a brief:

- Access to your client's Google Drive Library
- Be logged into PWF
- Client copies of the documents referenced in this procedure

Documents referenced in this procedure:

- Project Brief Template
- Completed Brief example 1
- Complete Brief example 2

- [Project Timeline Overview]
- [WIP/Weekly Project Update]
- [SOP Checklist]

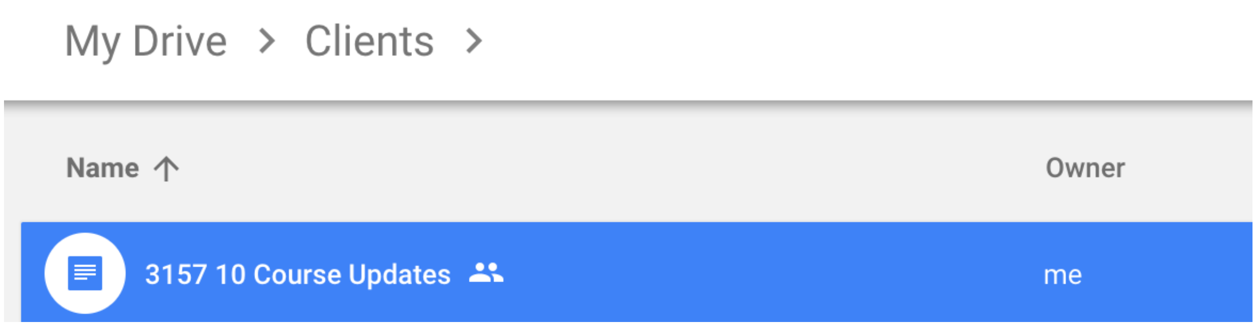
Process steps

A. Receive request for a project
B. Create a completed brief
C. Receive approval from client
D. Update appropriate places

Procedure

1. Receive request by client for a project or task to be carried out. Use your initiative at this stage to decide whether a project brief is required (for example if it's a document to be proofed you wouldn't need a brief).
2. Create a task or project in PWF.
3. Open the *Project Brief Template* and create a copy in Google Drive.
4. Save the brief in Google Drive – Clients – Client Name - Project Briefs using the naming convention: Project Number Task Number Brief Description (as per the example below):

[In Drive]



[In PWF]

5. Fill out the project brief template. You will see in the template some optional headings and an estimate table, use these as needed (depending on the project). *Here is an example* of a completed and authorized Project Brief.
6. Where the project is complex with a number of corresponding factors, use the *Project Timeline Overview* and link to this within the Brief. This spreadsheet will help clients and our internal team see at a glance an overview of key tasks, who's responsible and by when.
7. Once completed, send the project brief to the client for approval.
8. On approval, complete the following steps:
    a. Take a screenshot of the approval table and paste this into the original.
    b. Edit the original with any notes or additional information from the client.
    c. Update the SOP spreadsheet with this task (if applicable)
    d. Update your weekly project update with the task
    e. Link to the project brief in the relevant PWF task and share with internal team.
9. If you have changes to the scope of the brief, update the "Edits to Original Scope or Additional Information" section at the end of the brief and let your team know the brief has changed. Where relevant, have these signed off by the client.

Key SOP Information

Responsible for doing process	Lead VA's
Ensuring the process is done	
Frequency	☑ •Daily ☐ Weekly ☐ Monthly ☐ Quarterly

Version Control

Author:	Justine Parsons	Approved:	Alice Rae-Flick
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