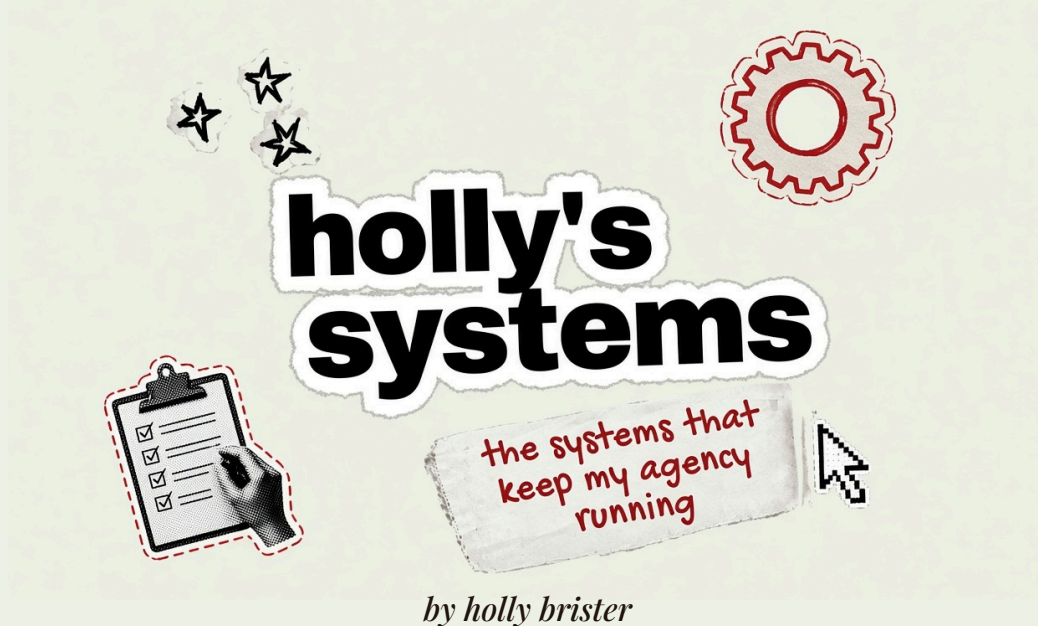




Hey, welcome to episode 5 of Idea to Business. You've checked your idea and started winning clients. Now it's time for the part that keeps it all running: your systems.

I'm the founder of Regen Digital, a B2B digital marketing agency I started 3 years ago with my best friend. Every week we run sales, client content, reporting and creator campaigns, and none of it lives in my head. It lives in our systems.

A system is just a decision you only make once. Write it down, give it a home, and the business stops relying on anyone remembering everything.

You don't need expensive software or a big team for this. Just one home for your work and the habit of writing things down.

From this guide, you will have:

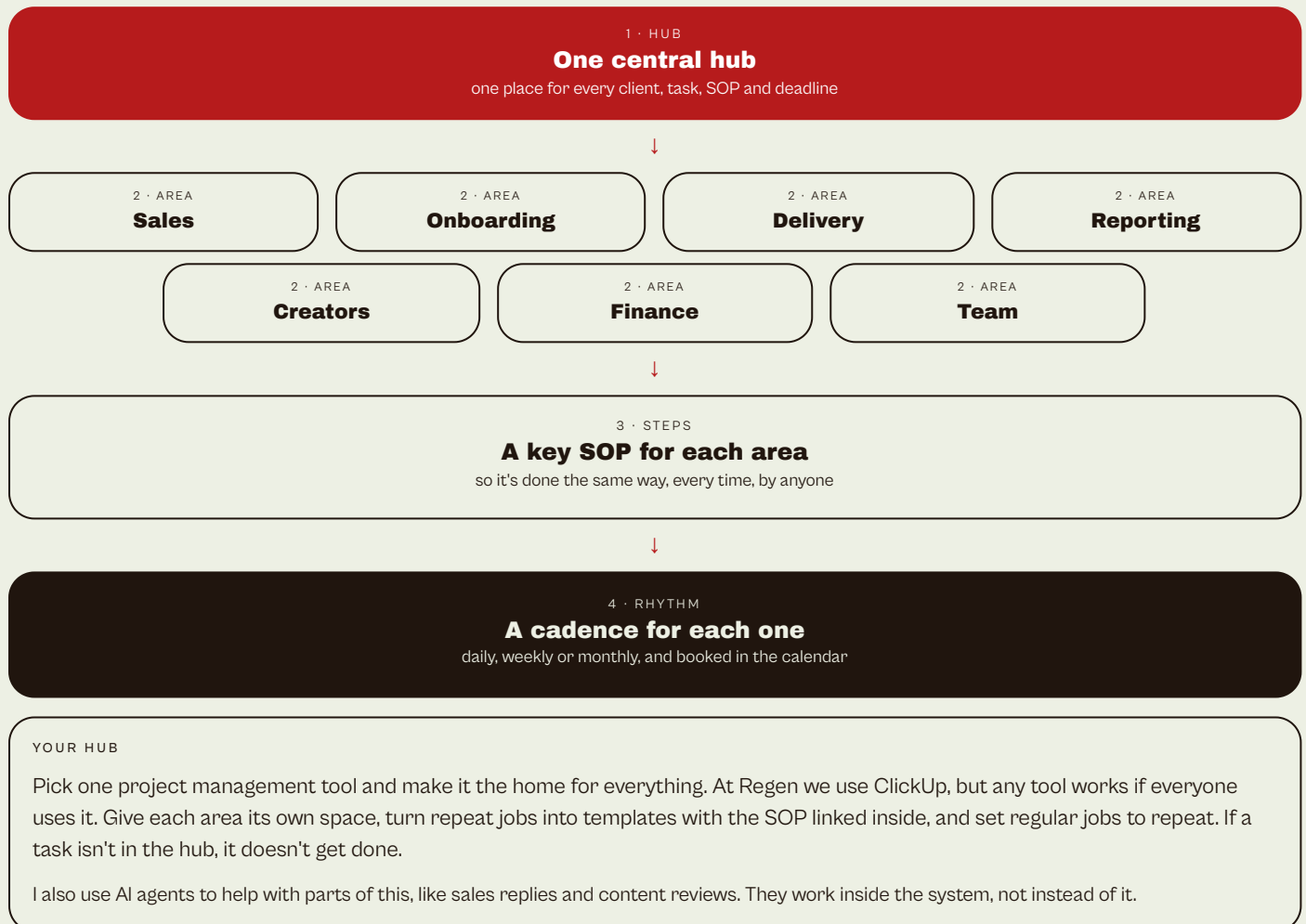
- 01 A simple map of your business: every area, around one central hub
- 02 A system and a key SOP for each area, from sales to hiring
- 03 A cadence and a short checklist for every one
- 04 One SOP template, and a prompt to help you write them
- 05 A checklist to tick off each system as you set it up

how it all fits together

every area, one hub, the same rhythm

When you're starting out, it's normal to hold everything in your head. That works until you take on a few more clients, and every question comes back to you.

A **system** is just a repeatable way of doing something. It has a home (where it lives), steps (how it's done) and a rhythm (when it happens). Each area of your business gets its own system, and they all live in one place.



the systems, area by area

a system, a key SOP, a cadence and a checklist

Every area of the business gets the same four things: a simple system, one key SOP that explains how it runs, a cadence for when it happens, and a short checklist. Start with sales, then work through the rest.

AREA 01

sales

a pipeline that runs every single week

THE SYSTEM

In episode 3, I shared my sales playbook: how I find, pitch and win new clients. This is the system around it, so sales happens every week, not just when things go quiet. Your list, your outreach and your follow-ups all feed one pipeline, and one dashboard shows you where everyone is.

WHAT THE SOP COVERS

Building and topping up your lead list. Your outreach sequence. Moving each lead through the pipeline. Follow-ups, so every lead has a next step and a date. The Friday review of your four numbers: people contacted, replies, meetings booked and clients won.

KEY SOP

SOP: sales

CADENCE

Daily outreach, Friday review

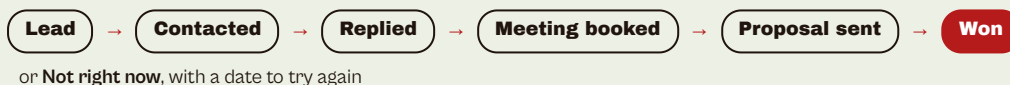
TOOLS

HeyReach, Instantly

CHECKLIST

- | | |
|---|---|
| ☐ Pipeline stages set up in your hub | ☐ Daily outreach block in the calendar |
| ☐ A dashboard showing the four numbers | ☐ Friday review booked in |
| ☐ A next step and a date on every lead | ☐ Won deals go straight to onboarding |

THE PIPELINE STAGES



THE DASHBOARD

Your four numbers, then everyone in your pipeline, their stage and their next step. I built mine with AI, but a dashboard in your hub works too.

FOLLOW-UPS

Every lead has a next step and a date. No date, no follow-up. "Not right now" gets a date too.

THE WEEKLY SALES RHYTHM

Monday: top up the list. **Every day:** an outreach block, reply to everyone, clear today's follow-ups. **Friday:** check the four numbers, fix the leakiest step, update the pipeline.

AREA 02

client onboarding*from a yes to the first piece of work*

THE SYSTEM

Everything between a client saying yes and the work starting. It's their first real experience of working with you, so it should feel calm and organised. The same steps, every time.

WHAT THE SOP COVERS

The contract and first invoice. The welcome email and kickoff call. The onboarding form for goals, brand assets and logins. Setting the client up in your hub, and agreeing the first month's plan.

CHECKLIST

- | | |
|--|--|
| ☐ Contract signed, first invoice sent | ☐ Onboarding form completed |
| ☐ Welcome email and kickoff call | ☐ Client set up from the template |

KEY SOP

SOP: onboarding

CADENCE

Every new client

TOOLS

Your hub + a form

AREA 03

delivery and content*the day-to-day work, done the same way*

THE SYSTEM

The work itself: content calendars, writing, design, reviews and posting. Every piece goes through the same steps, so nothing goes out unchecked and nothing sits waiting for a reply.

WHAT THE SOP COVERS

Planning the monthly calendar. Writing a brief for each piece. Internal review, then client review with a clear deadline. Scheduling, posting and logging feedback for next month.

CHECKLIST

- | | |
|--|--|
| ☐ Calendar agreed each month | ☐ Internal review before the client sees it |
| ☐ Every piece has a brief, owner and date | ☐ Approved, scheduled, marked as live |

KEY SOP

SOP: content

CADENCE

Monthly plan, weekly production

TOOLS

Your hub + design tools

AREA 04

client reporting*what's working, the same way every month*

THE SYSTEM

Showing clients what's working, in the same format, at the same time every month. Good reporting means a client never has to wonder what you're doing.

WHAT THE SOP COVERS

Pulling the numbers from each platform. Filling in the same report template. Three lines on what worked, what didn't and what's next. Sending it with a short walkthrough, and a quarterly goals review.

CHECKLIST

- | | |
|--|--|
| ☐ Report due on the same day each month | ☐ What worked, what didn't, what's next |
| ☐ The same template every time | ☐ Quarterly review with each client |

KEY SOP

SOP: reporting

CADENCE

Monthly, plus quarterly

TOOLS

Your hub + platform data

AREA 05

creators and ugc*finding, briefing and paying creators*

THE SYSTEM

At Regen, this is Influence by Regen, our creator programme. Every campaign has the same moving parts: the right creators, a clear brief, approvals, posting dates and payment.

WHAT THE SOP COVERS

Finding and shortlisting creators. The brief template. Agreements and usage rights. Checking drafts against the brief. Tracking posting dates, logging results and paying creators on time.

KEY SOP

SOP: creators

CADENCE

Per campaign, weekly check-ins

TOOLS

Your hub: a creator database

CHECKLIST

- | | |
|--|---|
| ☐ Creator database: niche, rates, past work | ☐ Agreement signed before work starts |
| ☐ A brief template for every campaign | ☐ Results logged, creator paid on time |

AREA 06

finance and admin*the bits that keep the business healthy*

THE SYSTEM

Invoices, expenses, contracts and subscriptions. Nobody's favourite job, but it keeps everything else possible. Make it a rhythm, not something you get round to.

WHAT THE SOP COVERS

Sending invoices on the same day each month. Chasing anything overdue. Logging expenses and receipts. Reviewing subscriptions. A monthly look at income, costs and cash in the bank.

KEY SOP

SOP: finance

CADENCE

Weekly check, monthly invoicing

TOOLS

Xero

CHECKLIST

- | | |
|--|---|
| ☐ Invoices out on the same day each month | ☐ Subscriptions reviewed regularly |
| ☐ Overdue invoices chased weekly | ☐ Monthly money check booked in |

AREA 07

hiring and team*how people join, learn and know what's expected*

THE SYSTEM

This is where every other SOP pays off. When everything is written down, a new person can get going quickly, and everyone knows exactly what they own.

WHAT THE SOP COVERS

Writing each role down: what they own and what good looks like. Onboarding a new hire. Setting up tool access, and removing it when someone leaves. The weekly team check-in.

KEY SOP

SOP: team

CADENCE

Weekly check-in, per new hire

TOOLS

Your hub + SOP library

CHECKLIST

- | | |
|--|---|
| ☐ Each role written down | ☐ Tool access in, and out on leaving |
| ☐ Onboarding plan for new hires | ☐ A named owner on every task |

THE STEPS

the sop template

one template for every area, and a prompt to fill it

An **SOP**, or standard operating procedure, is a simple written guide to how one job gets done. Start with one key SOP per area, then add more as you go. To write one, do the task as normal and talk it through or record your screen. Write every step down, then hand it to someone else. Wherever they get stuck, fix the SOP.

Keep your SOPs in your hub, organised by area, and link each one to the task it belongs to. If it runs past a page, it's two workflows.

● ● ● THE SOP TEMPLATE · COPY EVERYTHING BELOW

SOP: [area and workflow, e.g. SOP: onboarding]

PURPOSE [what this is for, in one line]
OWNER [who does it]
WHEN [what triggers it, and how often]
TOOLS [every tool, link and template needed]

STEPS
1. [one action per step]
2. []
3. []

DONE LOOKS LIKE [how you know it's finished]
LAST UPDATED [date] by [name]

● ● ● THE PROMPT · PASTE IN YOUR NOTES AND AI WRITES THE SOP

Please turn my notes into a clear SOP. Plain British English, short sentences, no jargon. Please write:

1. TITLE AND PURPOSE: which area, and one line on what it's for
2. OWNER AND WHEN: who does it, and how often
3. TOOLS: every tool, link and template I mention
4. STEPS: numbered, one action per step
5. DONE LOOKS LIKE: how we know it's finished
6. CHECKLIST: the steps as a short list
7. GAPS: anything unclear or missing, as questions for me

Please don't invent steps, tools or numbers. Ask me which workflow this is and who does it, then ask me to paste my notes or a transcript.

your systems checklist

check off each system once you've set it up

You've been through every area of the business. Now tick each one off as it goes live. One at a time is fine.

THE HUB

- ☐ One central hub chosen
- ☐ A space for each area
- ☐ SOP library set up
- ☐ Recurring tasks set to repeat

SALES

- ☐ SOP: sales written
- ☐ Pipeline stages set up
- ☐ Dashboard: the four numbers
- ☐ Weekly sales rhythm booked in

CLIENT ONBOARDING

- ☐ SOP: onboarding written
- ☐ Onboarding template ready
- ☐ Onboarding form ready

DELIVERY AND CONTENT

- ☐ SOP: content written
- ☐ Monthly calendar process
- ☐ Internal and client review steps

CLIENT REPORTING

- ☐ SOP: reporting written
- ☐ Report template ready
- ☐ Monthly report day set

CREATORS AND UGC

- ☐ SOP: creators written
- ☐ Creator database set up
- ☐ Brief template ready

FINANCE AND ADMIN

- ☐ SOP: finance written
- ☐ Monthly invoice day set
- ☐ Monthly money check booked in

HIRING AND TEAM

- ☐ SOP: team written
- ☐ Roles written down
- ☐ New hire onboarding plan

REMEMBER

A system doesn't have to be perfect. It just has to be written down and used.

THANK YOU

Thank you so much for reading my systems guide. Systems aren't about making your business rigid. They're what give you the time and headspace to do the work you actually love. I can't wait to hear which system you build first.

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