



CRAFT EDGE

GROW YOUR TRADE. MASTER YOUR CRAFT.

Contractor SOP Start Kit

Your free, bite-sized toolkit to launch Standard Operating Procedures that deliver consistent quality, save time, and power your growth.

Written by
Justin Shirley,
CraftEdge CEO

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Our Purpose

CraftEdge is the ultimate partner for home improvement business owners who are ready to break through ceilings and build something lasting.

We exist to give contractors, remodelers, and tradesmen the edge they've been missing — not just through better marketing, but through smarter systems, winning strategies, and proven playbooks built from real-world experience.

CraftEdge is where craftsmanship meets business mastery, turning hard work into real growth, real freedom, and real success. It's not just about working harder — it's about working smarter, building faster, and creating a legacy that stands strong for generations.

Welcome & How to Use This Kit

Why SOPs?

- **Consistency:** Every team member follows the same proven steps
- **Efficiency:** Cut misunderstandings, reduce re-work, speed up delivery
- **Scalability:** Train new hires in minutes, not weeks

How to Use This Kit

1. Review the Quick-Start Checklist (p.4) to pick your first 3 processes.
2. Copy the Fillable SOP Template (p.5) into your own document.
3. Customize each section with your company details.
4. Review the Sample SOPs (pp.6–7) to match tone & detail.
5. Roll out to your team and update quarterly.

Quick-Start Checklist

Tackle in order for maximum impact:

1. Lead Intake & Tracking
2. Proposal Creation & Delivery
3. Job Scheduling & Dispatch
4. Safety Inspection
5. Project Close-Out & Client Handover

Fillable SOP Template

SOP Title:

E.g. “Lead Intake & Tracking”

Purpose:

Why this process exists.

Scope:

Who and what it covers.

Responsibilities:

Role	Responsibility
[Role Name]	[Their duty in this SOP]
[Role Name]	[Their duty in this SOP]

Procedure Steps:

Step 1: [Description of first action]
Step 2: [Next action, who does it, and how]
Step 3: ...

Tools & Materials:

- [Software / form / template name]
- [Link or location of template folder]

Metrics & KPIs:

- [e.g. “Response time ≤ 2 hours”]
- [e.g. “Error rate < 5%”]

Revision History

Date	Version	Description	Author
MM-DD-YYYY	1	Initial Draft	[Your Name]

Sample SOP: Lead Intake & Tracking

Purpose: Capture every inbound inquiry quickly and accurately to maximize quoting efficiency.

Scope: All residential service inquiries via phone, email, or web form.

Responsibilities:

- Lead Coordinator: Reviews and logs new inquiries
- Sales Manager: Qualifies leads, schedules site visits
- Office Admin: Sends confirmation emails

Procedure Steps:

1. **Morning Review (8 AM):** Lead Coordinator checks overnight inquiries.
2. **Data Entry:** Copy details into CRM → tag as “New Lead.”
3. **Assignment:** Update status to “Needs Qualifying” and assign to Sales Manager.
4. **Follow-Up Call:** Sales Manager calls within 2 hours to confirm scope & budget.
5. **Confirmation Email:** Office Admin sends “Appointment Confirmation” template once call complete.

Tools & Materials:

- CRM (e.g. JobProgress, ServiceTitan, JobNimbus)
- Email Template: “Appointment Confirmation”
- Intake Form: [Link to web form export]

Metrics & KPIs:

- Lead response time ≤ 2 hours
- Qualification rate ≥ 40%

Revision History

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Sample SOP: Project Close-Out & Client Handover

Purpose: Finish every project cleanly, ensure paperwork is complete, and leave the client delighted.

Scope: All completed service and installation projects.

Responsibilities:

- Site Supervisor: Final walkthrough & photos
- Office Admin: Send completion email & satisfaction survey
- Warranty Coordinator: Register warranty, upload to CRM

Procedure Steps:

1. **Walkthrough Checklist:** Supervisor completes itemized punch list.
2. **Photo Documentation:** Capture “before & after” shots.
3. **Client Sign-Off:** Obtain client signature on completion form.
4. **Email Handover:** Admin sends “Project Complete” email + survey link.
5. **Warranty Registration:** Coordinator completes warranty form in CRM.

Tools & Materials:

- Punch-List Template (Google Drive)
- Survey Link (SurveyMonkey)
- Warranty Form (CRM module)

Metrics & KPIs:

- Client satisfaction score $\geq 4.5/5$
- Warranty registration ≤ 48 hours post-completion

Revision History

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SOP Implementation Tips

- **Start Small:** Roll out one SOP, gather feedback, then expand.
- **Use Visuals:** Add screenshots or photos for clarity in longer procedures.
- **Train Live:** Walk through the SOP on an actual job with your team.
- **Review Quarterly:** Set a calendar reminder to update every 3 months.
- **Get Buy-In:** Celebrate wins and show time saved to encourage adoption.

Next Steps & Free Resources

Build your full SOP library with CraftEdge:

- Editable fill-in-the-blank templates for 10 common contractor processes
- Five additional sample SOPs (e.g. Safety Inspection, Proposal Delivery)
- 30-minute SOP-strategy call with our experts



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Email: info@getcraftege.com

Website: getcraftege.com