

# EMAIL DELEGATION SOP TEMPLATE

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MY SAVVY BRAND

BRAND ALIGNMENT & DESIGN

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# OVERVIEW

## **Purpose:**

This SOP outlines how to manage [Your Name]'s inbox effectively. It details what to respond to, when to escalate, how to maintain brand tone, and the tools used.

## **Who this SOP is for:**

[Assistant or Team Member Name]

# INBOX DETAILS

**Primary Email Address:** . yourname@domain.com]

## **Access Method:**

- Google Workspace Delegation
- Front
- Missive
- Other: \_\_\_\_\_

## **Folders/Labels to Use:**

- "Respond" – assistant can reply
- "Flag for [Your Name]" – needs attention
- "Waiting" – pending reply
- "Complete" – resolved

# WHAT TO DELEGATE

- Calendar & scheduling
- Customer service
- Newsletter replies
- Payment reminders
- Vendor or internal coordination

## **Sample Reply Template:**

*"Hi [Name], thank you for reaching out! I've noted this for [Your Name] and will follow up as needed. Let me know if you need anything else in the meantime."*

# WHAT TO ESCALATE TO [YOUR NAME]

- Legal or sensitive issues
- Media or investor inquiries
- Difficult or angry clients
- Requests for pricing exceptions
- Anything unclear or strategic

## **How to Escalate:**

- Add label: "Flag for [Your Name]"
- Notify via Slack or email

# BRAND VOICE + TONE

- Professional yet friendly
- Use contractions (you're, I'll)
- No slang or emojis
- Proofread before sending

## **Approved Sign-offs:**

- Best,
- Warmly,
- Thank you,
- [Your Custom Sign-off]

# RESPONSE TIME EXPECTATIONS

- Weekdays: within 24 hours
- Weekends: flag if urgent
- Always prioritize VIPs

# WEEKLY WORKFLOW

## Monday:

- Review flagged/waiting folders
- Follow up on open threads

## Friday:

- Archive completed emails
- Recap any pending issues

# TOOLS WE USE

- Gmail / Outlook / Missive
- Asana / ClickUp / Notion
- LastPass
- Google Docs

# WHAT IF YOU'RE NOT SURE?

- Don't guess — flag the email
- Ping me on Slack or email

Need help implementing this SOP?  
Visit: [www.mysavvybrand.com](http://www.mysavvybrand.com)