

Cleaning Business SOP Template

Practical cleaning business template • Customize fields before use

Brand customization: This TidyOps-branded example shows a finished presentation. Replace the logo, colors, company details, and placeholders with your own brand before use.

Standard Operating Procedures Manual

[YOUR COMPANY NAME]

[Company Address]

[Phone Number]

[Email Address]

[Website]

DOCUMENT INFORMATION

SOP Manual Owner:

Approved By:

Effective Date:

Current Version:

Last Review Date:

Next Review Date:

PURPOSE OF THIS SOP MANUAL

This manual documents the standard processes used to operate [YOUR COMPANY NAME].

The goals are to:

- Deliver consistent service
- Reduce mistakes
- Improve customer experience
- Train employees faster
- Establish clear responsibilities
- Improve safety
- Protect customer property
- Maintain quality standards
- Make the business easier to manage and scale

Employees should follow approved procedures and ask a supervisor when circumstances fall outside those procedures.

HOW TO USE THIS TEMPLATE

For each process, document:

Purpose — Why does this procedure exist?

Owner — Who is responsible for it?

Trigger — What starts the process?

Required Information — What is needed before beginning?

Procedure — What steps should be followed?

Quality Standard — What does successful completion look like?

Exceptions — What situations require escalation?

Records — What should be documented?

Metrics — How will performance be measured?

SOP FORMAT

Use this format when adding a new procedure.

SOP: [PROCEDURE NAME]

SOP ID:

Department:

Process Owner:

Version:

Effective Date:

Purpose

Trigger

Required Information / Materials

Procedure

Step 1:

Step 2:

Step 3:

Step 4:

Step 5:

Exceptions / Escalation

Required Records

KPI / Metric

1. LEAD INTAKE SOP

SOP ID: SALES-001

Purpose

Capture every prospective customer consistently and make sure each lead receives appropriate follow-up.

Required Lead Information

- ☐ Customer name
- ☐ Phone
- ☐ Email
- ☐ Service address
- ☐ Requested service
- ☐ Property type
- ☐ Preferred service date
- ☐ Frequency
- ☐ Lead source
- ☐ Relevant property details

Procedure

1. Record the lead immediately.
2. Confirm contact information.
3. Determine requested service.
4. Gather required property information.
5. Determine whether an estimate or walkthrough is required.
6. Assign the next action.
7. Set a follow-up date.
8. Update lead status.

Lead Status

- ☐ New
- ☐ Contacted
- ☐ Qualified
- ☐ Estimate Needed
- ☐ Estimate Sent
- ☐ Follow-Up
- ☐ Won
- ☐ Lost

Response-Time Goal

New leads should receive an initial response within:
minutes / hours

KPI

Lead Response Time:

Lead-to-Customer Conversion Target: %

2. ESTIMATE SOP

SOP ID: SALES-002

Purpose

Create consistent, profitable estimates based on sufficient property and service information.

Procedure

9. Confirm customer information.
10. Confirm service address.
11. Determine service type.
12. Gather property details.
13. Assess property condition.
14. Identify add-ons.
15. Estimate labor requirements.
16. Calculate direct costs.
17. Apply pricing rules.
18. Review expected profitability.
19. Prepare estimate.
20. Send estimate.
21. Schedule follow-up.

Estimate Approval Required When

- ☐ Price exceeds \$
- ☐ Discount exceeds %



- ☐ Margin is below %
- ☐ Specialty work is included
- ☐ Commercial contract exceeds \$
- ☐ Other:

3. ESTIMATE FOLLOW-UP SOP

SOP ID: SALES-003

Follow-Up Schedule

Follow-Up 1: days after estimate

Follow-Up 2: days after estimate

Follow-Up 3: days after estimate

Procedure

- 22. Confirm estimate was received.
- 23. Ask whether the customer has questions.
- 24. Address scope questions.
- 25. Record objections.
- 26. Update estimate if authorized.
- 27. Record won/lost status.

Lost Reason

- ☐ Price
- ☐ Competitor
- ☐ Timing
- ☐ No Response
- ☐ Scope
- ☐ Customer Delayed
- ☐ Outside Service Area
- ☐ Other:

4. NEW CUSTOMER SETUP SOP

SOP ID: CUST-001

When an estimate is accepted:

- ☐ Create customer record
- ☐ Verify contact details
- ☐ Verify service address
- ☐ Confirm service type

- ☐ Confirm price
 - ☐ Confirm frequency
 - ☐ Record property details
 - ☐ Record pets
 - ☐ Record access instructions securely
 - ☐ Record special surfaces
 - ☐ Record customer priorities
 - ☐ Provide applicable policies
 - ☐ Obtain required agreement / acceptance
 - ☐ Establish payment method / terms
 - ☐ Schedule first service
 - ☐ Send confirmation
-

5. SCHEDULING SOP

SOP ID: OPS-001

Before Scheduling

Confirm:

- ☐ Service type
- ☐ Estimated duration
- ☐ Required crew size
- ☐ Cleaner qualifications
- ☐ Equipment requirements
- ☐ Service area / travel time
- ☐ Customer availability
- ☐ Access requirements

Scheduling Rules

Standard Arrival Window:

Travel Buffer:

Maximum Daily Labor Per Cleaner:

Maximum Travel Radius:

Procedure

28. Review service requirements.
29. Identify qualified cleaners.
30. Check availability.
31. Account for travel.
32. Assign job.

- 33. Confirm customer schedule.
 - 34. Notify assigned team.
-

6. PRE-JOB PREPARATION SOP

SOP ID: OPS-002

Before leaving for a job:

- ☐ Review job sheet
 - ☐ Review customer instructions
 - ☐ Review checklist
 - ☐ Confirm access
 - ☐ Confirm pets
 - ☐ Confirm special surfaces
 - ☐ Confirm add-ons
 - ☐ Confirm required products
 - ☐ Confirm equipment
 - ☐ Confirm supplies
 - ☐ Confirm crew assignment
 - ☐ Confirm schedule
-

7. ARRIVAL SOP

SOP ID: FIELD-001

Upon arrival:

- 35. Arrive within the assigned service window.
 - 36. Park according to customer instructions.
 - 37. Confirm correct property.
 - 38. Follow approved entry procedure.
 - 39. Secure keys/access credentials.
 - 40. Review job instructions.
 - 41. Identify obvious safety issues.
 - 42. Document relevant pre-existing conditions where required.
 - 43. Begin time tracking according to company procedure.
-

8. STANDARD CLEANING SOP

SOP ID: FIELD-002

Follow the assigned service checklist.

General workflow:

- ☐ Review customer priorities



- ☐ Gather supplies
- ☐ Work systematically
- ☐ Work top to bottom
- ☐ Prevent cross-contamination
- ☐ Use approved products
- ☐ Follow surface-care requirements
- ☐ Complete assigned rooms
- ☐ Complete floors
- ☐ Complete add-ons
- ☐ Conduct final inspection

Company Cleaning Sequence

9. DEEP CLEANING SOP

SOP ID: FIELD-003

Deep-cleaning jobs should follow the company Deep Cleaning Checklist.

Additional focus may include:

- ☐ Baseboards
- ☐ Doors / Frames
- ☐ Detailed Fixtures
- ☐ Cabinet Fronts
- ☐ Heavy Buildup
- ☐ Window Sills
- ☐ Blinds
- ☐ Detailed Bathroom Areas
- ☐ Detailed Kitchen Areas
- ☐ Other:

If the condition exceeds the estimated scope, contact a supervisor before materially expanding the work.

10. MOVE-IN / MOVE-OUT SOP

SOP ID: FIELD-004

Before starting:

- ☐ Confirm property is ready



- ☐ Confirm utilities are available
 - ☐ Confirm remaining belongings
 - ☐ Confirm appliance scope
 - ☐ Confirm cabinet scope
 - ☐ Document damage / maintenance concerns
 - ☐ Confirm disposal authorization before removing property
- Complete the assigned Move-Out Cleaning Checklist.

11. COMMERCIAL / JANITORIAL SOP

SOP ID: FIELD-005

Before service:

- ☐ Review facility scope
- ☐ Review task frequencies
- ☐ Review security procedures
- ☐ Review consumable responsibilities
- ☐ Review restricted areas
- ☐ Review specialty requirements

Complete tasks according to the client's approved scope and frequency schedule.

Do not substitute a general office-cleaning checklist for client-specific contractual requirements.

12. POST-CONSTRUCTION SOP

SOP ID: FIELD-006

Before work begins:

- ☐ Confirm site readiness
- ☐ Confirm construction hazards
- ☐ Confirm required PPE
- ☐ Confirm authorized areas
- ☐ Confirm debris-removal responsibility
- ☐ Confirm specialty surface requirements
- ☐ Confirm phase: rough / final / touch-up

Stop work when site conditions exceed employee training or company authorization.

13. ADD-ON SERVICE SOP

SOP ID: FIELD-007

Examples:

- ☐ Oven
- ☐ Refrigerator
- ☐ Cabinets
- ☐ Interior Windows
- ☐ Linen Change
- ☐ Carpet Cleaning
- ☐ Floor Care
- ☐ Other:

Before performing an add-on:

- 44. Confirm it is included in the job.
- 45. Confirm cleaner is trained.
- 46. Confirm required products/equipment.
- 47. Complete service.
- 48. Mark task complete.

Do not perform unapproved add-ons solely because a customer asks onsite.

14. OUT-OF-SCOPE REQUEST SOP

SOP ID: FIELD-008

If a customer requests additional work:

- 49. Listen to the request.
 - 50. Do not promise price or completion unless authorized.
 - 51. Determine whether the service is offered.
 - 52. Contact supervisor if approval is required.
 - 53. Obtain required customer authorization.
 - 54. Document added work.
 - 55. Update job/work order where appropriate.
-

15. FINAL QUALITY CHECK SOP

SOP ID: QA-001

Before leaving:

- ☐ Review checklist
- ☐ Check customer priorities
- ☐ Inspect kitchen
- ☐ Inspect bathrooms



- ☐ Inspect floors
 - ☐ Inspect mirrors / glass
 - ☐ Check add-ons
 - ☐ Check corners / edges
 - ☐ Remove cleaning supplies
 - ☐ Verify trash handling
 - ☐ Document unresolved issues
- Cleaner Self-Inspection Required:

- ☐ Yes
- ☐ No

16. SUPERVISOR INSPECTION SOP

SOP ID: QA-002

Inspection Frequency

Passing Score

%

If an inspection fails:

- 56. Document deficiency.
- 57. Photograph where appropriate.
- 58. Assign corrective action.
- 59. Reclean when appropriate.
- 60. Coach employee.
- 61. Track recurring deficiencies.
- 62. Reinspect where required.

17. RECLEN SOP

SOP ID: QA-003

When a legitimate quality concern is received:

- 63. Record complaint.
- 64. Review service scope.
- 65. Determine whether issue relates to included work.
- 66. Review job notes/photos.
- 67. Contact customer.
- 68. Schedule corrective work where appropriate.
- 69. Assign cleaner/supervisor.
- 70. Inspect correction.
- 71. Close issue.

72. Record root cause.

Reclean Root Cause

- ☐ Missed Task
- ☐ Training
- ☐ Time / Scheduling
- ☐ Scope Confusion
- ☐ Equipment
- ☐ Product
- ☐ Customer Expectation
- ☐ Other:

18. CUSTOMER COMPLAINT SOP

SOP ID: CUST-002

- 73. Listen without arguing.
- 74. Document the complaint.
- 75. Confirm relevant facts.
- 76. Review job scope.
- 77. Review notes and photos.
- 78. Escalate when required.
- 79. Offer authorized resolution.
- 80. Follow up with customer.
- 81. Document outcome.

Escalate Immediately When Complaint Involves

- ☐ Damage
- ☐ Injury
- ☐ Security
- ☐ Theft Allegation
- ☐ Harassment
- ☐ Discrimination
- ☐ Significant Safety Issue
- ☐ Legal Threat
- ☐ Other Serious Incident

19. DAMAGE / BREAKAGE SOP

SOP ID: RISK-001

If damage occurs or may have occurred:

- 82. Stop work if necessary.
 - 83. Prevent further damage.
 - 84. Notify supervisor.
 - 85. Document item and location.
 - 86. Take authorized photographs.
 - 87. Record relevant facts.
 - 88. Notify customer according to policy.
 - 89. Create incident record.
 - 90. Do not conceal damage.
 - 91. Do not make unauthorized compensation promises.
-

20. INJURY / SAFETY INCIDENT SOP

SOP ID: SAFE-001

In an emergency, prioritize immediate safety and emergency assistance.

For workplace incidents:

- ☐ Obtain necessary emergency assistance
- ☐ Stop unsafe work
- ☐ Notify supervisor
- ☐ Document incident
- ☐ Preserve relevant information
- ☐ Follow required reporting procedures
- ☐ Follow workers' compensation procedures where applicable
- ☐ Conduct follow-up review

Company procedures must comply with applicable workplace-safety requirements.

21. CHEMICAL SAFETY SOP

SOP ID: SAFE-002

Employees must:

- ☐ Use approved products
- ☐ Read labels
- ☐ Follow dilution instructions
- ☐ Maintain proper labels
- ☐ Use required PPE
- ☐ Follow ventilation requirements
- ☐ Follow storage procedures
- ☐ Never mix incompatible chemicals
- ☐ Know how to access applicable SDS information
- ☐ Report spills/exposure

22. KEY & PROPERTY ACCESS SOP

SOP ID: SEC-001

Customer access information should be treated as sensitive.

Employees must:

- ☐ Use access only for assigned work
 - ☐ Never share credentials unnecessarily
 - ☐ Never label keys with unnecessary customer-identifying information
 - ☐ Never duplicate keys without authorization
 - ☐ Never photograph access credentials
 - ☐ Secure keys/cards while assigned
 - ☐ Report lost credentials immediately
 - ☐ Follow lock-up procedure
-

23. OPENING / CLOSING PROPERTY SOP

SOP ID: SEC-002

Before leaving:

- ☐ Required windows checked
 - ☐ Doors secured
 - ☐ Lights set as instructed
 - ☐ Thermostat left as instructed
 - ☐ Equipment removed
 - ☐ Keys returned / secured
 - ☐ Alarm set if required
 - ☐ Property locked
 - ☐ Job marked complete
-

24. PET SAFETY SOP

SOP ID: FIELD-009

Before entering:

- ☐ Review pet information
- ☐ Follow customer instructions
- ☐ Do not release pets



- ☐ Do not feed pets unless specifically authorized
- ☐ Avoid unsafe interaction

If a pet creates a safety risk:

- 92. Stop affected work.
- 93. Move to a safe location.
- 94. Contact supervisor/customer according to procedure.
- 95. Do not continue until the risk is addressed.

25. CANCELLATION / RESCHEDULING SOP

SOP ID: CUST-003

When a customer requests a change:

- 96. Verify customer/job.
- 97. Record request time.
- 98. Compare against cancellation policy.
- 99. Determine applicable fee according to authorized policy.
- 100. Reschedule if requested.
- 101. Update schedule.
- 102. Notify assigned cleaners.
- 103. send confirmation.

Do not improvise cancellation fees.

26. NO-ACCESS / LOCKOUT SOP

SOP ID: CUST-004

If the team cannot enter:

- 104. Verify access instructions.
- 105. Attempt authorized contact.
- 106. Wait according to company procedure.
- 107. Contact supervisor.
- 108. Document attempted access.
- 109. Do not force entry.
- 110. Mark job status appropriately.
- 111. Apply any authorized policy consistently.

Standard Wait Time: minutes

27. PAYMENT COLLECTION SOP

SOP ID: FIN-001

- 112. Verify service completion.
- 113. Verify final authorized amount.
- 114. Process payment/invoice according to customer terms.
- 115. Provide receipt where applicable.

116. Record payment status.

117. Escalate failed payment appropriately.

Employees should never store sensitive card or banking credentials in unauthorized systems.

28. FAILED PAYMENT SOP

SOP ID: FIN-002

118. Mark payment unsuccessful.

119. Notify authorized office staff.

120. Contact customer according to policy.

121. Request appropriate payment update.

122. Record follow-up.

123. Pause future service when authorized.

124. Resume service after requirements are satisfied.

29. SUPPLY INVENTORY SOP

SOP ID: INV-001

Inventory Review Frequency

☐ Daily

☐ Weekly

☐ Biweekly

☐ Monthly

Track:

☐ Chemicals

☐ Microfiber

☐ Mop Supplies

☐ Vacuum Supplies

☐ PPE

☐ Trash Liners

☐ Paper Products

☐ Other Consumables

Reorder Point

Order when inventory reaches:

30. EQUIPMENT MAINTENANCE SOP

SOP ID: INV-002

For each equipment type:

- ☐ Inspect
- ☐ Clean
- ☐ Replace consumable components
- ☐ Test operation
- ☐ Document problems
- ☐ Remove unsafe equipment from service
- ☐ Schedule repair/replacement

Maintenance Frequency:

31. EMPLOYEE HIRING SOP

SOP ID: HR-001

- ☐ Define role
- ☐ Publish job opportunity
- ☐ Receive applications
- ☐ Screen using job-related criteria
- ☐ Conduct structured interview
- ☐ Complete scorecard
- ☐ Complete lawful screening where applicable
- ☐ Make hiring decision
- ☐ Complete required employment documentation
- ☐ Begin onboarding

Employment practices should be reviewed for applicable law.

32. NEW CLEANER ONBOARDING SOP

SOP ID: HR-002

- ☐ Employment documentation
- ☐ Company orientation
- ☐ Policies
- ☐ Attendance
- ☐ Scheduling
- ☐ Timekeeping
- ☐ Customer privacy

- ☐ Access/security
 - ☐ Safety
 - ☐ Chemicals
 - ☐ Equipment
 - ☐ Cleaning procedures
 - ☐ Software
 - ☐ Shadow shifts
 - ☐ Skills assessment
 - ☐ Field-readiness decision
-

33. CLEANER TRAINING SOP

SOP ID: HR-003

A cleaner should demonstrate required competencies before independent assignment.

Training should cover applicable:

- ☐ Cleaning fundamentals
 - ☐ Kitchen cleaning
 - ☐ Bathroom cleaning
 - ☐ Bedrooms/common areas
 - ☐ Floors
 - ☐ Detail cleaning
 - ☐ Chemicals
 - ☐ Surfaces
 - ☐ Equipment
 - ☐ Safety
 - ☐ Property care
 - ☐ Customer service
 - ☐ Time management
 - ☐ Quality control
-

34. ATTENDANCE / CALLOUT SOP

SOP ID: HR-004

Employees should know:

Callout Contact:

Required Notice:

Approved Communication Method:

When a callout occurs:

125. Record employee notification.
126. Determine affected jobs.
127. Find qualified replacement if available.
128. Adjust schedule.
129. Notify affected customers where necessary.
130. Document attendance according to company policy.

Apply attendance policies consistently and in compliance with applicable leave and employment requirements.

35. TIMEKEEPING SOP

SOP ID: HR-005

Employees must accurately record all compensable working time according to company policy and applicable law.

Track as appropriate:

- ☐ Job labor
- ☐ Travel
- ☐ Training
- ☐ Meetings
- ☐ Supply preparation
- ☐ Equipment maintenance
- ☐ Other work

Corrections should maintain an appropriate audit trail.

36. PERFORMANCE COACHING SOP

SOP ID: HR-006

When performance falls below standard:

131. Identify specific issue.
 132. Review relevant evidence.
 133. Discuss expected standard.
 134. Determine root cause.
 135. Provide coaching/training.
 136. Establish corrective actions.
 137. Set review date.
 138. Document according to company policy.
 139. Reassess performance.
-

37. EMPLOYEE OFFBOARDING SOP

SOP ID: HR-007

When an employee leaves:

- ☐ Remove future assignments
 - ☐ Recover keys
 - ☐ Recover access cards
 - ☐ Recover equipment
 - ☐ Recover uniforms as applicable
 - ☐ Disable software access promptly
 - ☐ Remove customer-data access
 - ☐ Process final payroll according to applicable requirements
 - ☐ Update team records
 - ☐ Document company-property return
-

38. CUSTOMER OFFBOARDING SOP

SOP ID: CUST-005

When recurring service ends:

- ☐ Record cancellation reason
- ☐ Remove future appointments
- ☐ Resolve outstanding balance
- ☐ Return customer keys/property
- ☐ Disable unnecessary access credentials
- ☐ Close recurring billing where appropriate
- ☐ Preserve required records
- ☐ Request feedback where appropriate

Cancellation Reason

- ☐ Price
 - ☐ Moving
 - ☐ Service Quality
 - ☐ Schedule
 - ☐ Competitor
 - ☐ No Longer Needs Service
 - ☐ Company Termination
 - ☐ Other:
-

39. DAILY OPERATIONS REVIEW

SOP ID: MGMT-001

At the start of each operating day:

- ☐ Review today's schedule
- ☐ Review staffing
- ☐ Review callouts
- ☐ Review special jobs
- ☐ Review first-time customers
- ☐ Review access issues
- ☐ Review equipment needs
- ☐ Review customer requests

At the end of the day:

- ☐ Confirm jobs completed
 - ☐ Review incomplete jobs
 - ☐ Review incidents
 - ☐ Review customer complaints
 - ☐ Review time entries
 - ☐ Review tomorrow's schedule
 - ☐ Assign follow-ups
-

40. WEEKLY OPERATIONS REVIEW

SOP ID: MGMT-002

Review:

- ☐ Revenue
- ☐ Jobs completed
- ☐ Labor hours
- ☐ Revenue per labor hour
- ☐ Schedule utilization
- ☐ Recleans
- ☐ Complaints
- ☐ Inspection scores
- ☐ Cancellations
- ☐ Outstanding estimates
- ☐ Outstanding invoices
- ☐ Staffing issues
- ☐ Supply levels



☐ Equipment issues

Top Operational Issue

Action Owner

Due Date

41. MONTHLY MANAGEMENT REVIEW

SOP ID: MGMT-003

Review:

- ☐ Revenue
- ☐ Direct labor
- ☐ Job profitability
- ☐ Profit margin
- ☐ Leads
- ☐ Conversion rate
- ☐ Customer retention
- ☐ Average job value
- ☐ Revenue per labor hour
- ☐ Cleaner utilization
- ☐ Quality scores
- ☐ Reclean rate
- ☐ Customer complaints
- ☐ Reviews
- ☐ Employee turnover
- ☐ Marketing performance

What Worked

What Needs Improvement

Next-Month Priorities

140.

141.

42. SOP CHANGE CONTROL

Do not allow important operating procedures to change informally without documentation.

Change Request

SOP:

Requested Change:

Reason:

Requested By:

Date:

Approval

☐ Approved

☐ Rejected

☐ Further Review Required

Approved By:

Effective Date:

New Version:

SOP MASTER REGISTER

SOP ID	Procedure	Owner	Version	Last Reviewed
SALES-001	Lead Intake			
SALES-002	Estimates			
OPS-001	Scheduling			
FIELD-002	Standard Cleaning			
QA-001	Final Quality Check			
QA-003	Reclean			
RISK-001	Damage / Breakage			
SAFE-001	Safety Incident			
SEC-001	Keys / Access			
FIN-001	Payment Collection			
HR-001	Hiring			
HR-002	Onboarding			

HR-003 Training**MGMT-001** Daily Review

Add additional procedures as your business grows.

SOP REVIEW SCHEDULE

Review procedures:

- ☐ Quarterly
- ☐ Every 6 Months
- ☐ Annually
- ☐ After Major Incident
- ☐ After Significant Process Change
- ☐ After Regulatory / Legal Change
- ☐ Other:

Next Full Manual Review:

EMPLOYEE ACKNOWLEDGMENT

Where appropriate:

I acknowledge that I have received access to the procedures applicable to my role and understand that I am responsible for following current company procedures and asking my supervisor when I am uncertain how to proceed.

Employee:

Signature:

Date:

Applicable SOP Version:

IMPORTANT BUSINESS, SAFETY & HR NOTICE

This SOP template is a general business-management framework. It is not legal, employment, payroll, tax, workplace-safety, insurance, regulatory, or professional advice.

A written procedure does not make an unsafe, unlawful, or inappropriate business practice acceptable.

Businesses should adapt their procedures to their actual services, workforce, equipment, chemicals, insurance coverage, contracts, customers, and jurisdictions. Specialized cleaning environments may require additional training and compliance procedures.

Policies involving employment, wages, safety, chemicals, privacy, customer contracts, payment practices, insurance claims, or regulated facilities should receive appropriate professional review.

TEMPLATE CUSTOMIZATION NOTICE

Do not try to complete this entire manual in one sitting.

Start with the procedures that create the greatest operational risk or occur most often. Document the current process, assign an owner, train the team, measure the result, and improve the procedure over time.

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Provided by TidyOps