

SOP: Final Delivery Formatting and Submission Standards

This SOP details the **final delivery formatting and submission standards**, covering document formatting requirements, file naming conventions, quality assurance checks, submission protocols for various platforms, version control practices, and compliance with client or organizational guidelines. Its objective is to ensure all deliverables are consistently presented, error-free, and submitted in accordance with agreed-upon standards to maintain professionalism and client satisfaction.

1. Document Formatting Requirements

- Use approved templates and style guides for all deliverables.
- Font: Arial or Calibri, size 11 or 12, with consistent heading styles.
- Margins: Standard 1-inch on all sides.
- Line spacing: 1.15 or 1.5, as per client specification.
- Include page numbers and version date in the footer.
- Embed tables, figures, and images clearly labeled with captions.
- Check document accessibility (alt tags, readable fonts, etc.).

2. File Naming Conventions

- Use the format: `ProjectName_DeliverableName_VersionNumber_Date` (e.g., `ABCWebsite_FinalReport_v2_2024-06-01.pdf`).
- Use underscores (`_`) to separate segments and avoid spaces or special characters.
- Include the appropriate file extension (`.docx`, `.pdf`, `.xlsx`, etc.).

3. Quality Assurance Checks

- Run spelling and grammar checks on all documents.
- Verify compliance with client/organizational style guides.
- Cross-reference all data, figures, and citations for accuracy.
- Ensure all links and references are accessible and functional.
- Remove all tracked changes and personal information from file metadata before submission.

4. Submission Protocols

- Confirm preferred submission platform (e.g., email, client portal, cloud storage, project management system).
- Compress large files and/or organize into logical folders if required.
- Provide a summary email/message listing deliverables, version, and highlights/changes.
- Request confirmation of receipt, where applicable.

5. Version Control Practices

- Maintain a version history with brief change logs (either within the document or in a separate log file).
- Increment version numbers systematically (v1, v2, etc.), updating dates accordingly.
- Store all major versions on the designated shared drive or repository.

6. Compliance with Guidelines

- Review all client or organizational guidelines prior to submission.
- Ensure all mandatory legal, branding, or confidentiality requirements are met.
- Retain all final submission records according to company policy.

7. Responsibility and Review

- Project managers or designated team leads are responsible for verifying final compliance before delivery.

- All team members involved in production must review this SOP regularly and adhere to updates.