

# SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Create Potential Client Folder	May 18, 2024	1

## Process Frequency (Daily/Weekly/Monthly/Project Based)

## Project Based

## Process Description

Create a Folder to put documents in while in the sales process.

Who's Involved		What are the inputs?
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.
Ryan and/or Jeff	Sales	Google Drive

### What are the sequential steps?

[illegible]

**What are the outputs [Defined Standards of Completion or Deliverables]**

This process is complete when a new folder with the clients name is created in the Clients - Potential Folder within Google.

## Who does the process transfer to next?

Name	Department or Function	Milestone
Ryan and Jeff	Sales	Initial client meeting / experience demo