

SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Create Initial Design Docs	5/13/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Per Project			
Process Description			
Create Initial Design Docs			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Ryan McDaniel	Sales	Signed contract	
Jeff Rodgers	Sales	Project Manager assigned	
What are the sequential steps?			
Step Description			Who is Responsible?
In Google drive, move client folder from "Client potential" to "Client shared"			Sales Person
Rename Template - Documentation & Checklist file to "[Client Last Name], [First name] - Documentation & Checklist"			Sales Person
Fill Out Google Doc "Documentation & CheckList" assigned to SALES			Sales Engineer
What are the outputs [Defined Standards of Completion or Deliverables]			
Initial documentation created and checklist is updated			
Preparation for sales to ops handoff			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Sales Person	Sales Person	Handoff Meeting	