SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Post Call Follow-up	5/15/24	1

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

Project Based

Process Description

Sales Person Introduction after Sales Lead has been assigned.

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
Ryan or Jeff	Sales	Email or phone call
Sales Manager	Sales Manager	

What are the sequential steps?

Step Description	Who is Responsible?
Email Potential client with assigned sales person cc on email an introductory email for the handoff (Use email template XX)	Sales Manager
Let them know who will be working with them on Designing their solution	Sales Manager
Let them have all of the Sales Person's Contact information	Sales Manager
Clairfy and set the expectations on the next steps	Sales Manager
Request plans for project	Sales Manager

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

Client receives an email introduction to their Sales Engineer and will have a clear understanding on what happens next.

Who does the process transfer to next?

Name	Department or Function	Milestone
Jeff or Ryan	Sales	Create potential client folder