SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Project Hand-off	6/12/24	V1

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

Project Based

Process Description

Outlines the process of a handoff from sales to production

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
Sales Person	Sales	Signed Contract
Project Manager	Project Manager	Initial Design Documents
Clayton Smith	Field Manager	Project Manager Assignment
Josh Kalscheur	Designer	
Operations Manager	Operations Manager	

What are the sequential steps?

Step Description	Who is Responsible?
PRE-MEETING ITEMS	Sales Person
Contact operations manager to coordinate meeting	Operations Manager
Schedule meeting in Quickbooks time / Google Calendar for all involved	Operations Manager
MEETING ITEMS	
Share vision/excitement for project with team	Sales Person
Review contract, scope of work and intial documentation	Sales Person
Share any questions that need to be solved	Sales Person
Establish timeline for project (start dates, completion goals, etc)	Sales Person
Answer / document questions that arise from the meeting	Sales Person
POST MEETING ITEMS	
Review meeting notes and determine if project needs a change order or a contract revision	Sales Person
Prepare introduction of PM to client / project team	Sales Person
Update Monday.com status	Sales Person

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

Completion of project handoff meeting
Monday board updated

Who does the process transfer to next?

Name	Department or Function	Milestone
Sales Person	Sales	Project Manager Introduction