

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Electrical Walk-thru	5/13/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
This outlines the process of the electrical walk-thru in the field.			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Project Manager	Project Management	Builder Scheduled Electrical Walk-Thru	
Sales Person	Sales	Monday.com , Google Drive	
Client	Client		
Electrician	Electrical Contractor		
Site Supervisor/Project PM	Builder		
What are the sequential steps?			
Step Description		Who is Responsible?	
PRIOR TO MEETING			
Meeting Requested w/ OTA by Builder or Client		Project Manager	
If not already, schedule the sales person to attend the meeting		Project Manager	
Review D-Tools for TV/Projector locations, note back boxes		Project Manager	
Review project for TV back box locations		Project Manager	
Create a list of requirements for outlets, dedicate circuits and LV keypad placements		Project Manager	
Print out TV elevations drawings on 8.5 x 11 paper (if before rough-in)		Project Manager	
Print out LV and lighting prints on 18x24 paper for meeting		Project Manager	
Print out lighting panel wiring report		Project Manager	
ON SITE - DURING MEETING			
Discuss any client changes that might impact the original design/vision of the system as the come up		Sales	
Document any client requests or changes by marking the print outs to note the request		Project Manager	
Relay electrical addons to electrician		Project Manager	
POST SITE VISIT			
If applicable - Provide printouts to sales person for CO creation for billable add-ons		Project Manager	
What are the outputs [Defined Standards of Completion or Deliverables]			
Electrical walkthrough completed			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Project Manager	Project Manager	Schedule rough-in	
Sales Person	Sales	Change order creation	