SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Initial Client Meeting & Experience Demo	5-15-24	1

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

Project Based

Process Description

Steps to Cover during the initial client meeting and experience demo

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

What are the sequential steps?

Step Description	Who is Responsible?
Setup meeting time at Experience House with Client	Sales
Schedule on Google Calendar using 139 Experience Center Schedule Calendar	Sales
Within Calendar Request, fill out our Address for the location	Sales
Within Calendar Request, insert Guest email address and your own email address	Sales
Press Save - It will ask if it is ok to invite from outside your organization - click yes	Sales
Send client an email confirming with timing expectation and what to bring - plans	Sales
Arrive at Experience House 30 minutes prior to meeting to check all systems and for demo house setup	Sales
Upon Guest Arrival, welcome them in, have them sit on the sofa, ask if they would like a drink	Sales
Briefly Discuss the Agenda.	Sales
Perform the demo. Deteremine what you should demo based on prior conversations, or give full demo	Sales
After Demo, pull their plans up on the conference room Display and go through them	Sales
Go over their priorities and create your intake notes.	Sales
Thank them for coming, walk them out and close the door behind them	Sales
Complete your intake notes	Sales
Press the away button at the front door when you leave so everything turns off	Sales

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

The initial meeting and demo is complete when the client leaves with excitement in their mind and you have a filled out intake that you can start a a design off of.

Who does the process transfer to next?

Name	Department or Function	Milestone
Ryan or Jeff	Sales	Send Thank You email to summarize visit
Ryan or Jeff	Sales	Initial Proposal Creation