

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Capture Lead in <a href="#">Monday.com</a>	5/13/24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
As needed			
Process Description			
Capture Lead			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
	Sales	Phone, Captivated, Email	
	Office Manager		
What are the sequential steps?			
Step Description			Who is Responsible?
Click "New Deal" or start typing in "+Add Deal" at bottom of Deals Pipeline section of Monday			Office or Sales
Assign Sales Manager as the Owner of the Project			Office or Sales
Enter Contact (Create New if it is a new client-Last Name, First Name)			Office or Sales
Enter Lead Source			Office or Sales
Enter "Lead" in Stage Column			Office or Sales
Enter Lead Arrival Date			Office or Sales
If the Lead came from a service call, mark YES			Office or Sales
Enter any pertinent Notes			Office or Sales
What are the outputs [Defined Standards of Completion or Deliverables]			
Lead is setup in Monday			
All information is entered and ready for Sales Manager			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
	Sales Manger	Lead Qualification / Lead Assignment	