

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Qualify Leads/Assign Sales Lead	5/15/24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
When Sales Leads arrive, assign to the correct sales person			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Ryan	Sales Manager	Sales Lead Captured in Monday.com	
What are the sequential steps?			
Step Description		Who is Responsible?	
Reach out to potential client for a discovery call		Sales Manager	
Determine desire, complexity and turn around time		Sales Manager	
Look at Monday's Deals Pipeline to determine how many leads each sales person is working on		Sales Manager	
Input Lead into Deals Pipeline		Sales Manager	
Assign Sales Person in Monday - which notifies them		Sales Manager	
Pass all pertinent information along - gathered from call, email, etc..		Sales Manager	
Enter priority level in Monday.com lead		Sales Manager	
Enter project type (Fast track or Type 4) in Monday.com lead		Sales Manager	
Enter desired date in Monday.com lead		Sales Manager	
What are the outputs [Defined Standards of Completion or Deliverables]			
A qualified lead makes it into our Sales Process.			
Lead assignment			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Ryan or Jeff	Sales	Initial Client Meeting and Experience	