SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Create Potential Client Folder	May 18, 2024	1

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

Project Based

Process Description

Create a Folder to put documents in while in the sales process.

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

What are the sequential steps?

Step Description	Who is Responsible?
Open Google Drive -> Clients Potential	Sales Person
Duplicate !Client, Template copy folder	Sales Person
Rename Folder - Last Name, First Name	Sales Person
Add any received plans to Design documentation folder -> Drawings	Sales Person

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

This process is complete when a new folder with the clients name is created in the Clients - Potential Folder within Google.

Who does the process transfer to next?

Name	Department or Function	Milestone
Ryan and Jeff	Sales	Inital client meeting / experience demo