

Initial Client Meeting & Experience Demo			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Review Required?	5/15/24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
Determine if a System Design Review is required			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Sales Engineer	Sales		
What are the sequential steps?			
Step Description		Who is Responsible?	
Are there parts of this solution we have never done before?		Sales	
Are there aspects of this project that will be challenging?		Sales	
Is there anything unique about this design?		Sales	
Is the system design large enough and you want to make sure you have everything covered?		Sales	
Is this an existing client, that needs a new solution?		Sales	
If you answered yes to any of the above questions, a review is required.		Sales	
What are the outputs [Defined Standards of Completion or Deliverables]			
Determined that a proposal review is required prior to sending to client.			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Brandon	Senior Programmer	Review the Design	
Josh	Designer	Review the System Design	
Clayton	Field Manager	Review the labor required	