	SOP Te	mplate		
Company Name	Process Name	Date Created	Revision Number	
One Touch Automation	Qualify Leads/Assign Sales Lead	5/15/24	1	
one recent tatemation	Process Frequency (Daily/We			
	Project	Based	,	
	Process De			
Wh	en Sales Leads arrive, assi	gn to the correct sa	ales person	
			nat 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 sec	quential 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 a	re the outputs [Defined Stand	ards of Completion o	or Deliverables]	
A qualified lead makes it into ou	r Sales Process.			
Lead assignment				
	Who does the proces	ss transfer to next?		
Name	Department of		Milestone	
Ryan or Jeff			nitial Client Meeting and Experience	
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