

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?

[illegible]

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