

## SOP Template

Company Name Process Name Date Created Revision Number One Touch Automation Project Hand-off 6/12/24 V1 Process

Frequency (Daily/Weekly/Monthly/Project Based)

### Project Based

#### Process Description

Outlines the process of a handoff from sales to production

Who's Involved What are the inputs?

Name Department or Function Documents, SOW, Approval, Labor, Software, Etc. Sales Person Sales Signed Contract

Project Manager Project Manager Initial Design Documents Clayton Smith Field Manager Project Manager Assignment Josh Kalscheur Designer

Operations Manager Operations Manager

#### What are the sequential steps?

Step Description Who is Responsible?

**PRE-MEETING ITEMS** Sales Person

Contact operations manager to coordinate meeting Operations Manager Schedule meeting in Quickbooks time / Google Calendar for all involved Operations Manager

#### MEETING ITEMS

Share vision/excitement for project with team Sales Person Review contract, scope of work and initial documentation Sales Person Share any questions that need to be solved Sales Person Establish timeline for project (start dates, completion goals, etc) Sales Person Answer / document questions that arise from the meeting Sales Person

#### POST MEETING ITEMS

Review meeting notes and determine if project needs a change order or a contract revision Sales Person Prepare introduction of PM to client / project team Sales Person Update Monday.com status Sales Person

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

Completion of project handoff meeting  
Monday board updated

#### Who does the process transfer to next?

Name Department or Function Milestone

Sales Person Sales Project Manager Introduction