	SOP To	emplate		
Company Name	Process Name	Date Created	Revision Number	
One Touch Automation	Post Call Follow-up	5/15/24	1	
	Process Frequency (Daily/W	eekly/Monthly/Project Bas	sed)	
	Project	Based		
		escription		
Sale	s Person Introduction after	Sales Lead has been a	ssianed.	
			e the inputs?	
Name	Department or Function	Documents, SOW, App	Documents, SOW, Approval, Labor, Software, Etc.	
Ryan or Jeff	Sales		Email or phone call	
Sales Manager	Sales Manager		•	
	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\			
		quential steps?		
Step Description Email Potential client with assigned sales person cc on email an introductory email for the handoff (Use			Who is Responsible?	
email template XX)	led sales person cc on email an inito	ductory email for the naridon (Os	Sales Manager	
Let them know who will be working with them on Designing their solution			Sales Manager	
Let them have all of the Sales Person's Contact information			Sales Manager	
Clairfy and set the expectations on the next steps			Sales Manager	
Request plans for project			Sales Manager	
			+	
What a	re the outputs [Defined Stand	dards of Completion or De	l eliverables1	
	ction to their Sales Engineer and will h			
Short receives an email introdu	cao to their dues Engineer and will I	aro a oldar understanding on w	пас парропо полс	
	Who does the proce	ess transfer to next?		
Name	·	or Function	Milestone	
Jeff or Ryan			reate potential client folder	
,			•	