

| SOP Template | | | |
|--|------------------------|---|---------------------|
| Company Name | Process Name | Date Created | Revision Number |
| One Touch Automation | Client Follow-up | | |
| Process Frequency (Daily/Weekly/Monthly/Project Based) | | | |
| Per Project | | | |
| Process Description | | | |
| | | | |
| Who's Involved | | What are the inputs? | |
| Name | Department or Function | Documents, SOW, Approval, Labor, Software, Etc. | |
| Ryan McDaniel | Sales | | |
| Jeff Rodgers | Sales | | |
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| What are the sequential steps? | | | |
| Step Description | | | Who is Responsible? |
| Initial Discovery Call | | | |
| Ask for electronic copy of prints | | | |
| Post Call Follow UP with Thank you email | | | |
| Create Potential Client Folder in Google Drive | | | |
| Schedule Inital Client Meeting & Experience Demo | | | |
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| What are the outputs [Defined Standards of Completion or Deliverables] | | | |
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| Who does the process transfer to next? | | | |
| Name | Department or Function | Milestone | |
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