	SOP	Template		
Company Name	Process Name	Date Created	Revision Number	
One Touch Automation	New Solution?	June 2, 2024	1	
	Process Frequency (Daily	/Weekly/Monthly/Proje	ect Based)	
	Proje	ect Based		
	Proces	s Description		
	New Solution	on Recommened		
Who's Involved What a			What are the inputs?	
Name	Department or Function	Documents, SC	ts, SOW, Approval, Labor, Software, Etc.	
	Service Tech	D	etailed Notes on Slack	
	Service Manager			
	Sales Manager			
	Sales Person			
	What are the	sequential steps?		
	Step Description	sequential Steps :	Who is Responsible?	
While on-site, Service Tech Determines a New Solution should be considered.			Service Tech	
Notify Service Manager			Service Tech	
Let Client know that a new solution should be considered and OTA will reach out asap			Service Tech	
Fake Detailed Notes			Service Tech	
Jpload notes on Slack			Service Tech	
Create New Lead in Deals Pipeline On Monday.com			Service Manager	
Notify Sales Manager			Service Manager	
Assign Sales Person			Sales Manager	
Start Fast Track Sales SOP			Sales Person	
	are the outputs [Defined Sta	•	n or Deliverables]	
lew Solution Sales Lead is cap	tured in Monday same day Service	e Tech Discovered		
	Who does the pro	ocess transfer to next	?	
Name		ent or Function	Milestone	
inaille_	Берагин	Sales	Fast Track Proposal Created	
		Jaico	i ast Hack i Toposal Createu	