

SOP Template

| Company Name | Process Name | Date Created | Revision Number |
|----------------------|---------------------|--------------|-----------------|
| One Touch Automation | Post Call Follow-up | 5/15/24 | 1 |

Process Frequency (Daily/Weekly/Monthly/Project Based)

Project Based

Process Description

Sales Person Introduction after Sales Lead has been assigned.

| Who's Involved | | What are the inputs? |
|----------------|------------------------|---|
| Name | Department or Function | Documents, SOW, Approval, Labor, Software, Etc. |
| Ryan or Jeff | Sales | Email or phone call |
| Sales Manager | Sales Manager | |
| | | |
| | | |
| | | |

What are the sequential steps?

[illegible]

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

Client receives an email introduction to their Sales Engineer and will have a clear understanding on what happens next.

Who does the process transfer to next?

| Name | Department or Function | Milestone |
|--------------|------------------------|--------------------------------|
| Jeff or Ryan | Sales | Create potential client folder |
| | | |
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