SOP Template			
Company Name	**Process Name**	**Date Created**	**Revision Number**
One Touch Automation	Capture Lead in Monday.com	5/13/24	1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
As needed			
Process Description			
Capture Lead			

Who's Involved		What are the inputs?	
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**	
	Sales	Phone, Captivated, Email	
	Office Manager		

What are the sequential steps?	
Step Description	**Who is Responsible?**
Click "New Deal" or start typing in "+Add Deal" at bottom of Deals Pipeline section of Monday	Office or Sales
Assign Sales Manager as the Owner of the Project	Office or Sales
Enter Contact (Create New if it is a new client-Last Name, First Name)	Office or Sales
Enter Lead Source	Office or Sales
Enter "Lead" in Stage Column	Office or Sales
Enter Lead Arrival Date	Office or Sales
If the Lead came from a service call, mark YES	Office or Sales
Enter any pertinent Notes	Office or Sales

What are the outputs [Defined Standards of Completion or Deliverables]
Lead is setup in Monday
All information is entered and ready for Sales Manager

Who does the process transfer to next?		
Name	**Department or Function**	**Milestone**
	Sales Manger	Lead Qualification / Lead Assignment