SOP Template

Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Client Training	6-6-24	1

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

Project Based

Process Description

Client Training On-Site

Who's Involved		What are the inputs?
Name	**Department or Function**	**Documents, SOW, Approval, Labor, Software, Etc.**
	PM	Final QC Checklist Complete
	Service Manager	
	Sales	
	Client	

What are the sequential steps?

Step Description	Who is Responsible?
Introduce Service Manager to Client (should know and be comfortable with PM and Sales at this step)	Sales Person
Make Sure Client Is Logged into All Apps (this should have been completed during UX Meeting)	Sales Person
Walk Room to Room - Showing everything we touched inside each room - Verify Operation with Client	Sales Person
Walk to the Security Keypad at Mudroom and have Client show you they can arm/disarm the system	Sales Person
Go to Security Panel and Show Client how to unplug the Alarm Battery and Transformer if ever needed	Project Manager
Go to Equipment Rack and show client where Savant Host, SMS, Router, Modem is Located	Project Manager
Discuss at Equipment Rack any Possible item that they may be involved in troubleshooting with support	Project Manager
Show them where all ISP Equipment is.	Project Manager
Show them where Source Equipment is located	Project Manager
Show them where the Lighting Control Processor is located and the Bridge Button they will need to hit	Project Manager
Demonstrate Scene Creation in Savant App by creating an Entertain Scene	Sales Person
Create another All Off Scene that turns all AV in the house Off	Sales Person
Go to Lighting Control Keypads (mudroom and primary bedroom) Go through functionality	Sales Person
Demonstrate how to make adjustments on Lutron App to Keypad Button Presses	Sales Person
Ask if they have any current System Questions	Sales Person
Discuss how/when they should reach out for Service (Captivated, Phone, Email)	Service Manager
Discuss Preventative Maintenance and Let them know we have a Maintenance Plan if they are interested	Service Manager
Setup another training for 2 weeks from now for a refresher and further tips/tricks	Sales Person
Discuss any open punch list items	PM
Tell them job is substantially completed and let them know final invoice will be sent	Sales Person
Let them know where to access all of their project documentation	Sales Person

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

All System Documentation is completed and Client has access to it.

Substantial completion is complete. Final Invoice may be sent.

A Follow up training is setup for 2 weeks from this meeting.

Who does the process transfer to next?

Name	Department or Function	Milestone
	PM	Send Final Invoice Request
	Service Manager	Service Turnover