**Sales SOP Template**

**SOP** Title

**SOP Number:**

**Department:**

**Version:**

**Effective Date:**

**Prepared By:**

**Revision History**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Description of Change** | **Author** | **Approver** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Purpose**

*Describe why this SOP exists. (e.g., “To standardize the sales process from lead capture through customer handoff, ensuring consistency, compliance, and efficiency.”)*

|  |
| --- |
| Description |

**Scope**

*Define which sales teams/roles this applies to.*

|  |
| --- |
| Description |

**Roles & Responsibilities**

|  |  |
| --- | --- |
| **Role** | **Responsibility** |
| Role | Description |
|  |  |
|  |  |

**Sales Tools and Systems**

*List the systems requirements.*

|  |
| --- |
| Description |

**Procedure**

|  |
| --- |
| 1. **Lead Management**
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. **Sales Call / Discover**
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. **Proposal / Quoting**
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. **Closing**
 |
| * Instruction
* Instruction
* Instruction
 |
| 1. **Post-Sale Handoff**
 |
| * Instruction
* Instruction
* Instruction
 |

**Documentation**

|  |
| --- |
| Description |

**Sign-Off**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Signature** | **Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |
| --- |
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