SOP Template: Client Consultation and Requirements Gathering

This SOP details the process of **client consultation and requirements gathering**, encompassing initial client meetings, understanding client needs and expectations, documenting functional and technical requirements, validating gathered information, and establishing clear communication channels. The goal is to ensure a comprehensive understanding of client objectives to guide successful project planning and execution.

1. Purpose

To define the procedures and responsibilities for effective client consultation and requirements gathering to ensure project success.

2. Scope

This SOP applies to all employees involved in consulting, business analysis, and project management, and covers all phases from the initial client meeting through requirements documentation and validation.

3. Responsibilities

Role	Responsibility
Project Manager	Facilitate meetings, oversee requirements process, ensure documentation completeness.
Business Analyst	Lead requirements gathering, validate information, act as liaison between client and team.
Client Representative	Provide necessary information, review and confirm documented requirements.
Technical Lead	Assist in technical requirements gathering, feasibility assessments.

4. Procedures

1. **Initial Client Meeting**
    - Schedule and conduct introductory meeting(s) with key client stakeholders.
    - Discuss project background, objectives, and preliminary expectations.
    - Document the meeting agenda and outcomes.
2. **Needs and Expectations Assessment**
    - Perform detailed interviews, workshops, or surveys to understand client goals.
    - Identify key pain points, desired outcomes, and success criteria.
3. **Requirements Documentation**
    - Capture functional requirements (features, user stories, business rules).
    - Capture technical requirements (security, integration, performance, compliance).
    - Organize requirements in a structured template or requirements management tool.
4. **Requirements Validation**
    - Review documented requirements with client for accuracy and completeness.
    - Incorporate client feedback and resolve any discrepancies.
    - Obtain formal client sign-off on requirements documentation.
5. **Establish Communication Channels**
    - Agree on primary points of contact and preferred modes of communication (e.g., email, conferencing tools).
    - Define meeting schedules, feedback loops, and escalation paths.

5. Documentation

- Client meeting notes and agendas
- Requirements specification documents
- Requirements validation and sign-off forms
- Communication plan

6. Review & Approval

This SOP must be reviewed annually or when changes in client consultation or requirements gathering processes occur.

Updates must be approved by the Project Management Office (PMO).

7. References

- Project Management Best Practices
- Business Analysis Body of Knowledge (BABOK)
- Company Communication Policy