# SOP Template: Client Requirements Review and Event Briefing

**Purpose:**

This SOP details the process for **client requirements review and event briefing**, including collecting and analyzing client needs, confirming event objectives, coordinating with relevant teams, preparing comprehensive briefings, and ensuring clear communication to all stakeholders. The purpose is to guarantee alignment with client expectations and facilitate successful event planning and execution.

## Scope

This SOP applies to all employees involved in event planning, client management, and coordination activities for client-driven events.

## Definitions

| Term | Definition |
|------|------------|
| Client | The individual or organization commissioning the event. |
| Event Briefing | A formal summary of client requirements, objectives, and event details, shared with stakeholders. |
| Stakeholders | All parties involved in event execution, including internal teams and external vendors. |

## Procedure

1. **Collection of Client Requirements**
   - Schedule and conduct initial meeting/interview with client.
   - Gather comprehensive information regarding event goals, budget, expected outcomes, audience, and specific requirements.
   - Document requirements using standard requirements capture forms.
2. **Analysis of Client Needs**
   - Review captured information for clarity, completeness, and feasibility.
   - Identify any gaps, ambiguities, or conflicts in requirements.
3. **Confirmation of Event Objectives**
   - List summarized client requirements and objectives.
   - Conduct follow-up meeting with client to validate and confirm all needs and objectives.
   - Document final, agreed-upon objectives.
4. **Coordination with Internal Teams**
   - Share summarized requirements and objectives with relevant departments (logistics, technical, creative, finance, etc.).
   - Assign responsibilities and deadlines.
5. **Preparation of Event Briefing Document**
   - Develop a comprehensive briefing document capturing all client requirements, objectives, roles, timelines, and points of contact.
   - Review document internally for accuracy.
6. **Briefing to Stakeholders**
   - Circulate the briefing document to all internal and external stakeholders.
   - Conduct an event briefing meeting to address queries and clarify expectations.
7. **Ongoing Communication**
   - Establish a communication channel (e.g., email, project management tool) for updates and changes.
   - Schedule periodic check-ins to ensure continued alignment.

## Roles and Responsibilities

| Role | Responsibility |
|------|----------------|

| Account Manager / Event Manager | Lead client meetings, capture requirements, prepare briefing documents, and coordinate communications. |
|---|---|
| Project Team | Provide input on feasibility, execute assigned responsibilities, and attend briefing sessions. |
| Client | Provide requirements, feedback, and timely approvals. |

## Documentation and Records

- Client Requirements Capture Form
- Confirmed Event Objectives Document
- Event Briefing Document
- Meeting Minutes and Communication Records

## References

- Company Event Planning Policy
- Client Communication Guidelines

## Revision History

| Date | Description of Change | Approved By |
|---|---|---|
| 2024-06-12 | Initial SOP template created | Event Planning Lead |