SOP Template: Client Consultation and Requirements Gathering

This SOP details the process of **client consultation and requirements gathering**, encompassing initial client engagement, understanding client needs, documenting project requirements, clarifying expectations, and establishing clear communication channels to ensure alignment between client objectives and project deliverables.

1. Purpose

To establish a clear and standardized process for consulting with clients and gathering precise requirements to facilitate successful project delivery.

2. Scope

This SOP applies to all team members involved in client engagement, business analysis, and project management.

3. Procedure

1. **Initial Client Engagement**
   - Schedule an introductory meeting with the client.
   - Send a meeting agenda in advance to outline discussion points.
2. **Understanding Client Needs**
   - Conduct discussions to identify client objectives, pain points, and desired outcomes.
   - Ask targeted questions to uncover explicit and implicit requirements.
3. **Documenting Project Requirements**
   - Prepare a requirements gathering template or checklist.
   - Record all client requests, constraints, and priorities in detail.
4. **Clarifying Expectations**
   - Review documented requirements with the client to verify accuracy.
   - Clarify any ambiguities or uncertainties via follow-up meetings or correspondence.
5. **Establishing Communication Channels**
   - Agree on preferred communication methods (email, phone, project management tools).
   - Define frequency of updates and key points of contact.
6. **Sign-off and Alignment**
   - Share the final documented requirements with the client for review and approval.
   - Obtain written confirmation/sign-off before project initiation.

4. Responsibilities

- **Account Manager / Consultant:** Lead the client consultation process and ensure all requirements are gathered and documented.
- **Project Manager:** Review gathered requirements to ensure feasibility and alignment with project scope.
- **Client Stakeholder:** Provide timely feedback and approvals.

5. Documentation and Records

- Meeting agendas and minutes
- Requirements gathering templates/checklists
- Signed-off requirements documents
- Email/correspondence logs

6. Review and Update

This SOP should be reviewed annually or as needed to incorporate process improvements or changes in client engagement strategy.