

# SOP: Client Consultation and Service Agreement Process

This SOP details the **client consultation and service agreement process**, encompassing initial client engagement, needs assessment, service proposal development, negotiation and agreement finalization, and documentation. The goal is to establish clear communication, mutual understanding, and formalized commitments between service providers and clients to ensure efficient and satisfactory service delivery.

## 1. Purpose

To establish standardized procedures for consulting with clients and formalizing service agreements, ensuring clarity, mutual understanding, and effective service delivery.

## 2. Scope

This SOP applies to all personnel involved in client consultations, needs analysis, proposal preparation, contract negotiation, and agreement documentation.

## 3. Responsibilities

Role	Responsibility
Account Manager / Consultant	Lead client interactions, conduct needs assessments, and develop proposals.
Legal/Contracts Team	Review and approve service agreements and related documentation.
Client	Provide required information, review proposals, negotiate terms, and approve agreement.
Management	Final approval of agreement and escalation point for exceptions.

## 4. Procedure

- Initial Client Engagement**
  - Receive client inquiry or initiate contact.
  - Log inquiry details (contact information, nature of request).
  - Schedule consultation meeting.
- Needs Assessment**
  - Conduct consultation (virtual/in-person) to understand client goals, requirements, and constraints.
  - Document key discussion points and agreed outcomes.
  - Clarify timeline expectations and budgetary considerations.
- Service Proposal Development**
  - Prepare tailored service proposal based on assessed needs.
  - Include scope, deliverables, timelines, pricing, and terms.
  - Submit proposal to client for review.
- Negotiation and Agreement Finalization**
  - Collect client feedback and enter negotiations if needed.
  - Revise proposal/contract as necessary based on discussions.
  - Obtain mutual agreement on final terms.
- Documentation and Sign-off**
  - Prepare final service agreement/contract.
  - Secure signatures from authorized representatives of both parties.
  - Store signed agreement securely and share copies with relevant stakeholders.
- Handover for Service Delivery**

- Notify service delivery teams and provide relevant documentation.
- Initiate service according to agreed-upon terms.

## **5. Records and Documentation**

- Client inquiry logs
- Needs assessment summaries
- Service proposals and communications
- Final signed service agreements
- Meeting notes and correspondence

## **6. References**

- Standard service agreement template
- Organizational contract policies
- Client due diligence procedures