Standard Operating Procedure (SOP)

Client Feedback Collection and Final Billing Procedures

This SOP details the **client feedback collection and final billing procedures**, encompassing methods for gathering client input post-service, analyzing feedback to improve service quality, preparing and verifying final invoices, communicating billing details to clients, processing payments, and addressing any billing inquiries or disputes to ensure client satisfaction and accurate financial closure.

1. Purpose

To ensure systematic collection of client feedback and accurate completion of final billing, enhancing service quality and client satisfaction while ensuring timely and precise financial closure.

2. Scope

This SOP applies to all completed client projects/services requiring post-engagement feedback and issuance of final invoices.

3. Responsibilities

- **Account Manager:** Initiates feedback process, communicates billing, and handles client inquiries.
- **Finance/Accounts Team:** Prepares and verifies invoices, processes payments, and resolves disputes.
- **Quality Assurance Team:** Analyzes feedback for continuous improvement.

4. Procedures

1. **Completion of Service/Project**
   - Verify all project deliverables are completed and accepted by the client.
2. **Initiate Client Feedback Collection**
   - Within 3 business days of project completion, send a standardized feedback request (email/form/survey link) to the client.
   - Ensure feedback form includes ratings, open comments, and improvement suggestions.
3. **Follow-up on Feedback**
   - Send a polite reminder after 5 business days if feedback is not received.
   - Optional: Offer a brief phone call for high-value or strategic clients.
4. **Analyze and Record Feedback**
   - Compile received feedback in a central database or CRM.
   - Share feedback summary with relevant teams for quality improvement.
5. **Prepare Final Invoice**
   - Finance reviews contract, deliverables, and any outstanding changes or credits.
   - Prepare itemized final invoice, ensuring accuracy and compliance with agreed terms.
6. **Verify Invoice Details**
   - Account Manager double-checks invoice against client agreement and deliverable log before sending.
7. **Communicate Billing to Client**
   - Email the final invoice to the client, detailing charges, payment terms, and accepted payment methods.
   - Attach any required supporting documentation.
8. **Process Payment**
   - Monitor account for received payment within the stipulated timeline.
   - Send a receipt or payment confirmation once payment is received.
9. **Address Billing Inquiries/Disputes**
   - Respond to client billing questions within 2 business days.
   - If there is a dispute, review documentation and communicate resolution steps to the client promptly.
10. **Close Account**
    - Upon payment and resolution of all issues, update internal records to reflect account closure.
    - Send a thank-you message to the client, summarizing the engagement and inviting future collaboration.

5. Records & Documentation

- Feedback forms and compiled reports
- Final invoice and correspondence
- Payment receipts
- Dispute logs (if any)

6. Review & Continuous Improvement

Feedback insights and billing dispute causes are reviewed quarterly to identify process improvement opportunities.

Note: Ensure client privacy and data security in all feedback and billing communications.