SOP: Client Feedback Collection and Event Debriefing

This SOP outlines **client feedback collection and event debriefing** processes, including methods for gathering customer insights, tools for collecting and analyzing feedback, structured debriefing sessions post-event, documentation of lessons learned, and action plans for continuous improvement. The purpose is to enhance client satisfaction, improve event planning and execution, and foster effective communication among team members for future success.

1. Purpose

- Enhance client satisfaction through actionable feedback.
- Drive continuous improvement in event planning and execution.
- Facilitate learning and effective team communication post-event.

2. Scope

- All team members involved in event management and execution.
- All events managed by the organization where client feedback is applicable.

3. Responsibilities

Role	Responsibility
Event Manager	Coordinate feedback collection, debrief sessions, and action plans.
Team Leads	Contribute to debrief sessions; document lessons learned for their department.
Client Relationship Manager	Distribute and collect client feedback, analyze results, report findings.

4. Procedure

4.1 Client Feedback Collection

1. Distribute feedback forms/surveys (online or paper) to clients within 2 business days post-event.
2. Optionally, schedule follow-up calls or interviews for qualitative insights.
3. Use tools such as Google Forms, SurveyMonkey, or dedicated CRM systems to collect responses.
4. Send a reminder if feedback is not received within 7 days.

4.2 Feedback Analysis

1. Compile all client feedback within a centralized document or dashboard.
2. Analyze results for key trends, areas of success, and opportunities for improvement.
3. Share summarized findings with relevant stakeholders prior to the debrief session.

4.3 Event Debriefing

1. Schedule a debrief session within 10 business days post-event.
2. Invite all team leaders and relevant team members.
3. Agenda should include:
    - Review of event objectives and outcomes
    - Client feedback summary
    - What worked well
    - Areas for improvement
    - Lessons learned

- Action items and assignments

4. Document key discussion points and decisions.

4.4 Documentation & Action Planning

1. Document all lessons learned and action items in an accessible format (e.g., shared drive, project management tool).
2. Assign responsibilities with due dates for each action item.
3. Track progress on action items and review during future planning sessions.

5. Tools & Resources

- Survey platforms: Google Forms, SurveyMonkey
- CRM & project management tools: HubSpot, Trello, Asana
- Shared documentation: Google Drive, Microsoft Teams

6. Review & Continuous Improvement

- This SOP should be reviewed annually or after major events.
- Incorporate team suggestions and updates based on lessons learned.

7. Appendix

- Sample Client Feedback Form
- Event Debrief Meeting Agenda Template
- Lessons Learned Log Template