SOP: Client Consultation and Site Assessment Procedures

This SOP details the **client consultation and site assessment procedures**, encompassing initial client engagement, needs analysis, site inspection protocols, data collection and documentation, risk assessment, feasibility evaluation, and reporting. The goal is to ensure thorough understanding of client requirements and site conditions to facilitate accurate project planning and execution.

1. Purpose

To standardize the process for conducting client consultations and site assessments, ensuring consistent, comprehensive, and accurate gathering of information for project planning and execution.

2. Scope

This SOP applies to all staff involved in client consultations, site inspections, data collection, risk assessment, and project feasibility evaluations.

3. Responsibilities

- **Consultant/Project Manager:** Lead consultation, coordinate site assessment, and ensure reporting.
- **Assessment Team:** Collect and document data, perform risk and feasibility evaluations.
- **Documentation Officer:** Maintain accurate and complete records.

4. Procedures

1. **Initial Client Engagement**
    - Respond to client inquiry promptly.
    - Schedule consultation meeting (remote or in-person).
    - Share pre-consultation questionnaire if applicable.
2. **Needs Analysis**
    - Document client's goals, requirements, constraints, and expectations.
    - Identify all stakeholders and key decision-makers.
    - Clarify scope, budget, and timeline.
3. **Site Assessment Planning**
    - Review collected client information.
    - Prepare site assessment checklist and required tools/equipment.
    - Obtain necessary access permissions.
4. **On-Site Inspection**
    - Conduct site walkthrough with client and/or key staff.
    - Inspect physical conditions (measurements, layout, utilities, access).
    - Take relevant photographs and sketches.
5. **Data Collection & Documentation**
    - Record observations using site assessment forms.
    - Collect any existing site plans, reports, or documentation from the client.
    - File all data securely and confidentially.
6. **Risk Assessment**
    - Identify potential hazards or site limitations.
    - Assess safety, environmental, logistical, and regulatory risks.
    - Document mitigation actions or considerations.
7. **Feasibility Evaluation**
    - Assess suitability for proposed project against site conditions and client objectives.
    - Determine technical, financial, and regulatory feasibility.
8. **Reporting**
    - Compile findings into a Site Assessment & Consultation Report (see template below).
    - Review report for accuracy and completeness.
    - Submit report to client and file a copy for records.
    - Discuss findings and next steps with client.

5. Documentation

Document	Description
Client Consultation Form	Details of client requirements and expectations
Site Assessment Checklist	Standardized form for on-site observations
Risk Assessment Sheet	Identification of hazards and mitigation
Site Assessment & Consultation Report	Comprehensive summary of findings and recommendations

6. Review & Revision

This SOP shall be reviewed annually and updated as necessary based on lessons learned and feedback.

Appendix: Site Assessment & Consultation Report Template

Section	Description
1. Project Overview	Client details, project summary, consultation date(s)
2. Client Requirements	Summary of objectives and constraints
3. Site Observations	Physical conditions, photos, measurements
4. Risk Assessment	Identified risks and mitigation strategies
5. Feasibility Evaluation	Assessment findings, challenges, opportunities
6. Recommendations & Next Steps	Summary of recommendations and proposed actions