SOP Template: Post-placement Follow-up and Client-Candidate Satisfaction Reporting

This SOP details the procedures for **post-placement follow-up and client-candidate satisfaction reporting**, including scheduling follow-up communications, gathering feedback from clients and candidates, assessing placement success, addressing any concerns or issues, documenting satisfaction levels, and implementing improvements. The goal is to ensure continuous engagement, maintain high satisfaction rates, and enhance the overall effectiveness of the placement process.

1. Purpose

To establish standardized processes for follow-up communications after placements and to ensure regular measurement and reporting of client and candidate satisfaction.

2. Scope

This SOP applies to all recruitment consultants and support staff involved in placement, post-placement engagement, and satisfaction monitoring.

3. Responsibilities

- **Recruitment Consultants:** Conduct follow-ups, gather feedback, and address initial concerns.
- **Account Managers/Client Relationship Managers:** Oversee follow-up schedules, review satisfaction data, and engage in escalation or improvement processes.
- **HR Support/Administrative Staff:** Document interactions, feedback, and action items in internal systems.

4. Procedure

1. **Schedule Follow-up Communications**
    - Set initial follow-up with both client and candidate within 1 week post-placement.
    - Schedule ongoing follow-ups at 1-month, 3-month, and 6-month intervals (adjust as per organizational policy).
2. **Gather Feedback**
    - Use standardized feedback forms or surveys for both clients and candidates.
    - Conduct feedback sessions via phone, email, or in-person as appropriate.
3. **Assess Placement Success**
    - Discuss role-fit, performance, and initial impressions with both parties.
    - Confirm continued employment and satisfaction through follow-up checkpoints.
4. **Address Concerns and Issues**
    - Document any concerns raised by either party promptly.
    - Escalate unresolved issues to the appropriate manager as per escalation matrix.
5. **Document Satisfaction Levels**
    - Log all interactions and feedback in the CRM or designated tracking system.
    - Rate satisfaction using a scorecard or agreed-upon criteria.
6. **Implement Improvements**
    - Analyze trends from feedback data in regular review meetings (quarterly or as defined).
    - Identify systemic issues and work with relevant teams to update processes or training.

5. Documentation and Reporting

- Store all follow-up notes and satisfaction surveys in the client's and candidate's records.
- Compile monthly or quarterly satisfaction reports for management review.
- Share key findings with stakeholders to drive continuous improvement.

6. Continuous Improvement

- Review feedback and performance data regularly to optimize the follow-up and satisfaction process.
- Solicit suggestions from teams for further enhancements.
- Update the SOP annually or as significant process changes occur.

7. References

- Feedback form template
- Client and Candidate communication scripts
- CRM/ATS user guidelines
- Escalation matrix

8. Revision History

Version	Date	Description	Author
1.0	2024-06-09	Initial release	Recruitment Ops