

SOP Template: Client Consultation and Event Requirement Gathering

This SOP details the process for **client consultation and event requirement gathering**, including initial client meetings, understanding client objectives, event scope definition, budget discussion, timeline establishment, venue and vendor considerations, and documentation of client preferences. The goal is to capture comprehensive event requirements to ensure successful planning, coordination, and execution that meet or exceed client expectations.

1. Purpose

To establish a structured process for client consultations and systematic gathering of event requirements, ensuring all details are captured to deliver successful events tailored to client needs.

2. Scope

This SOP applies to all client-facing event planners, coordinators, and related team members responsible for the initial stages of event planning.

3. Responsibilities

- **Event Planner/Coordinator:** Conduct consultations, document requirements, and maintain communication with the client.
- **Sales/Client Relations Team:** Schedule initial meetings and hand over new client information to the planning team.
- **Support Staff:** Assist with documentation and follow-up communications.

4. Procedure

1. **Schedule Initial Client Meeting**
 - Confirm date, time, and preferred meeting format (in-person, virtual, telephone).
 - Send meeting agenda to the client in advance.
2. **Conduct Client Consultation**
 - Welcome and introduce the team.
 - Review the meeting agenda.
 - Ask open-ended questions to understand client's vision and objectives.
3. **Gather Event Requirements**
 - Event type, theme, and format
 - Expected number of attendees
 - Preferred event date(s) and time
 - Client's objectives and key outcomes
4. **Define Event Scope**
 - Event duration
 - Services required (e.g., catering, A/V, decor, entertainment)
 - Special requests or considerations
5. **Discuss Budget**
 - Review client's overall budget and priorities
 - Clarify budget constraints and flexibility
6. **Establish Timelines**
 - Set planning milestones and deadlines
 - Confirm key decision and payment dates
7. **Venue and Vendor Considerations**
 - Determine preferred or required venue(s)
 - Discuss preferred/approved vendors or suggestions
8. **Document Client Preferences**
 - Record all requirements using the designated requirements gathering form or CRM system
 - Summarize client preferences for food, beverages, entertainment, decor, etc.
9. **Confirm and Review**
 - Summarize discussed requirements and confirm accuracy with the client
 - Address any outstanding questions or concerns
10. **Follow-Up**
 - Send a meeting recap and requirements summary

- Maintain open communication for additional input or clarifications

5. Documentation

- Client Requirements Gathering Form
- Client Meeting Notes & Recap Email/Templates
- Event Planning Timeline Checklist

6. Review and Update

This SOP should be reviewed annually or as needed to reflect updated best practices and client feedback.

7. Approvals

Prepared by: _____

Approved by: _____