SOP: Client Feedback Collection, Billing, and Event Debrief Documentation

This SOP details the process for **client feedback collection, billing, and event debrief documentation**, ensuring systematic gathering of client input, accurate invoicing, and comprehensive review of event outcomes. The procedure covers methods for soliciting and recording client feedback, generating and issuing bills promptly, and compiling detailed debrief reports to assess performance and identify areas for improvement, thereby enhancing client satisfaction and operational efficiency.

1. Scope

This SOP applies to all staff involved in event delivery, client communication, billing, and post-event review procedures.

2. Responsibilities

Role	Responsibility
Event Manager	Oversee feedback collection, ensure billing accuracy, coordinate debrief meetings
Accounts/Billing Staff	Prepare and issue invoices to clients
Client Relations	Manage client communications regarding feedback and service evaluation
All Event Team	Participate in event debrief and provide input for documentation

3. Procedure

3.1 Client Feedback Collection

1. Within 2 business days post-event, send a standardized feedback form to the client via email or agreed platform.
2. Follow up with a phone call if no response is received within 5 business days.
3. Record all feedback in the designated client feedback log (digital or physical as per company standards).
4. Aggregate feedback for future reference and trend analysis.

3.2 Billing

1. Review all event-related costs and ensure accuracy of expenses recorded.
2. Prepare a detailed invoice within 3 business days after the event concludes.
3. Send the invoice to the client via the pre-determined method (email, portal, or mail).
4. Monitor payment status; follow up on overdue accounts as per the company's financial policy.
5. Log the billing status and any client communications related to billing in the financial records.

3.3 Event Debrief Documentation

1. Schedule an internal debrief meeting with all involved team members within 5 business days post-event.
2. Use an event debrief template to capture key discussion points, including:
    - Event outcomes vs. objectives
    - Client feedback summary
    - Issues encountered and resolutions
    - Recommendations for future events
3. Store debrief documentation in the centralized event records folder.
4. Share relevant debrief outcomes and action items with management and, as appropriate, follow up with the client.

4. Documentation & Records

- Client feedback forms and logs
- Invoices and payment status records
- Event debrief reports

All documents should be reviewed quarterly for continuous improvement in service delivery and client satisfaction.

5. Review & Continuous Improvement

This SOP should be reviewed annually or as needed to incorporate best practices and address operational gaps.