Standard Operating Procedure (SOP): Client Onboarding and Initial Requirements Gathering

This SOP details the **client onboarding and initial requirements gathering** process, including client introduction, needs assessment, documentation of project goals, stakeholder identification, timeline establishment, and communication plan development. The objective is to ensure a seamless onboarding experience, accurate understanding of client expectations, and a solid foundation for project success through effective requirement elicitation and collaboration.

1. Scope

This procedure applies to all new client projects and must be followed by project managers, business analysts, and all team members involved in client engagement and project initiation.

2. Responsibilities

Role	Responsibilities
Project Manager	Oversee the onboarding process, assign tasks, ensure timely completion of onboarding activities.
Business Analyst	Lead requirement gathering sessions, document requirements, and validate understanding with the client.
Client Liaison	Main point of contact for the client, coordinate meetings, and ensure smooth communication.
All Stakeholders	Participate as needed in meetings and provide accurate, timely input.

3. Procedure

1. **Client Introduction**
   - Send a formal welcome email introducing the project team and outlines next steps.
   - Schedule kickoff meeting with relevant stakeholders.
2. **Needs Assessment**
   - Hold discovery sessions to understand the client's business, purpose, and high-level needs.
   - Request and review any existing documentation provided by the client.
3. **Documentation of Project Goals**
   - Document clear project objectives and success criteria as understood from discussions.
   - Share the documented goals with the client for confirmation and feedback.
4. **Stakeholder Identification**
   - Identify all key stakeholders, including decision-makers and subject matter experts.
   - List roles, responsibilities, and contact information.
5. **Timeline Establishment**
   - Collaboratively define major project milestones and delivery dates.
   - Document and communicate the timeline to all stakeholders.
6. **Communication Plan Development**
   - Agree on preferred channels and frequency of communication (e.g., email, meetings, status reports).
   - Set clear escalation procedures and points of contact.
7. **Sign-off and Next Steps**
   - Obtain client sign-off or written agreement on gathered requirements and plans.
   - Transition to project execution phase as per the agreed plan.

4. Documentation & Templates

- Client Onboarding Checklist
- Requirements Gathering Template
- Stakeholder Register Template
- Project Goals Document
- Communication Plan Template

5. Review & Improvement

This SOP should be reviewed annually or as required following feedback or process improvement initiatives.