

SOP Template: Venue Inspection and Booking Procedures

This SOP details the **venue inspection and booking procedures**, covering pre-inspection requirements, criteria for evaluating venue suitability, scheduling site visits, documenting inspection findings, client communication protocols, booking confirmation steps, contract review and execution, payment processing, and post-booking follow-up. The objective is to ensure a systematic, efficient process that guarantees venues meet client needs and organizational standards while facilitating clear communication and accurate record-keeping.

1. Purpose

To provide a standardized process for inspecting and booking venues, ensuring venues meet the required criteria, maintain client satisfaction, and support accurate documentation and communication.

2. Scope

This SOP applies to all staff involved in the process of venue inspection, selection, booking, contract review, and client liaison.

3. Responsibilities

- **Event Coordinator:** Lead and oversee the venue inspection and booking process.
- **Client Services:** Communicate with clients, relay updates, and address requirements or queries.
- **Finance:** Manage payment processing and financial documentation.

4. Procedures

1. Pre-Inspection Requirements

- Collect preliminary event details from the client (date, capacity, location, amenities, budget).
- Compile a shortlist of potential venues based on requirements.
- Obtain client approval for proposed venues.

2. Evaluation Criteria

- Location/accessibility
- Capacity and layout options
- Facilities (audio-visual, Wi-Fi, parking, restrooms)
- Compliance (insurance, permits, accessibility)
- Cost and payment terms
- Additional services (catering, technical support, security)

3. Scheduling Site Visits

- Contact venues to arrange appointments for inspections.
- Confirm scheduled dates with clients (if attending).
- Prepare venue inspection forms/checklists.

4. Documenting Inspection Findings

- Complete inspection forms during site visits, noting strengths, weaknesses, and concerns.
- Take photographs as supporting evidence where permissible.
- Compile findings into a summary report.

5. Client Communication Protocols

- Share inspection findings with the client promptly.
- Discuss pros, cons, and address any client queries.
- Support the client in making an informed venue selection.

6. Booking Confirmation Steps

- Contact the chosen venue to reserve the desired dates and facilities.
- Request written confirmation of booking.
- Notify the client of the confirmed reservation.

7. Contract Review and Execution

- Obtain and review the venue contract for accuracy and compliance with client/organizational needs.
- Clarify any discrepancies with the venue and/or client.
- Secure client approval/signature as necessary.

- Return executed contract to the venue.

8. Payment Processing

- Collect invoice from venue and forward to finance.
- Process deposit/full payment in accordance with contract terms.
- Confirm payment receipt with the venue.

9. Post-Booking Follow-Up

- Document booking details in internal records.
- Provide the client with a confirmation package (booking details, contact info, floor plan, etc.).
- Schedule reminders for remaining payments, important deadlines, or follow-up meetings.

5. Documentation & Records

- Venue shortlist and screening forms
- Inspection checklists/reports and photos
- Client communication logs
- Booking confirmation and contract copies
- Payment records
- Follow-up logs

6. References

- Company Event Planning Policies
- Standard Venue Contract Template
- Client Communication Policies

7. Revision History

Version	Date	Description	Author
1.0	2024-06-16	Initial draft	[Your Name]