SOP Template: Pre-event Client Consultation and Requirement Gathering

This SOP details the process of **pre-event client consultation and requirement gathering**, encompassing initial client meetings, needs assessment, event objectives identification, budget discussions, venue requirements, timeline planning, and special requests documentation. The goal is to ensure a clear understanding of client expectations and event specifications to facilitate effective planning and successful event execution.

1. Purpose

To establish a standardized approach for consulting with clients prior to event planning and accurately capturing all requirements to ensure successful event delivery.

2. Scope

This SOP applies to all staff involved in event planning and client management within the organization.

3. Responsibilities

- **Event Manager:** Lead the consultation, document requirements, and communicate with the client.
- **Client Liaison:** Schedule meetings, assist in gathering client information, and manage follow-up communications.
- **Support Staff:** Assist with documentation and participate in requirement analysis as needed.

4. Procedure

1. **Initial Contact & Meeting Scheduling**
   - Receive client inquiry via phone, email, or web form.
   - Assign a designated Event Manager or Client Liaison.
   - Schedule initial consultation (in person or virtual).
   - Send appointment confirmation to client.
2. **Client Consultation & Needs Assessment**
   - Welcome and introduce event planning team.
   - Explain the consultation process and objectives.
   - Engage the client to discuss overall event vision and specific needs.
3. **Event Objectives Identification**
   - Clarify the purpose and type of event (e.g., corporate, social, wedding, conference).
   - Identify desired outcomes and success metrics.
4. **Budget Discussion**
   - Discuss available budget and expected allocation for different elements (venue, catering, décor, entertainment, etc.).
   - Record any budget constraints or priorities.
5. **Venue Requirements**
   - Determine preferred event location(s), seating arrangements, and capacity.
   - Inquire about accessibility needs, parking, and other facilities.
6. **Timeline Planning**
   - Establish event date, time, and duration.
   - Identify any key milestones or deadlines.
7. **Special Requests Documentation**
   - Document any unique requirements (e.g., themes, cultural considerations, VIPs, dietary restrictions).
   - Clarify points of contact and communication preferences.
8. **Requirement Confirmation & Next Steps**
   - Summarize gathered information and confirm accuracy with the client.
   - Agree on follow-up actions and timelines for proposals or further discussions.
   - Distribute consultation notes to relevant team members.

5. Documentation

Document	Description	Responsible

Client Consultation Form	Detailed capture of client requirements and preferences	Event Manager
Meeting Notes	Summary of discussions and agreed actions	Client Liaison
Requirements Checklist	Checklist to ensure all relevant topics are covered	Event Team

6. Review & Update

This SOP should be reviewed annually or after major events to identify areas for improvement and incorporate feedback.

7. Appendices

- Sample Client Consultation Form
- Requirements Gathering Checklist