

SOP: Client Site Assessment and Checklist Preparation

This SOP details the process for **client site assessment and checklist preparation**, covering initial site evaluation, identification of client requirements, risk and compliance analysis, documentation of observations, and development of a comprehensive checklist. The goal is to ensure thorough site understanding and accurate preparation of checklists to support project planning, safety compliance, and operational efficiency.

1. Purpose

To standardize the procedure for conducting client site assessments and preparing corresponding checklists to ensure alignment with project requirements, safety standards, and operational goals.

2. Scope

This SOP applies to all personnel involved in client site visits, assessments, and checklist creation as part of project initiation or ongoing support.

3. Responsibilities

- **Site Assessment Team:** Conduct site visits, gather data, and document observations.
- **Project Manager:** Ensure assessment scheduling, coordination, and review of final checklist.
- **Compliance Officer:** Verify adherence to safety and regulatory standards.
- **Document Controller:** Maintain and distribute assessment documentation and checklists.

4. Procedure

1. **Preparation**
 - Review project scope and requirements.
 - Obtain relevant site information from the client.
 - Schedule site assessment with the client.
2. **Initial Site Evaluation**
 - Visit the client site as scheduled.
 - Conduct walkthroughs to assess current conditions.
 - Identify potential challenges or hazards.
3. **Identification of Client Requirements**
 - Interview client representatives to clarify expectations.
 - Document required outcomes, deliverables, and any special considerations.
4. **Risk and Compliance Analysis**
 - Identify risks related to safety, security, and operations.
 - Assess compliance with relevant regulatory and safety standards.
5. **Documentation of Observations**
 - Record findings, photographs, and supporting data.
 - Organize information by category (e.g., safety, infrastructure, equipment).
6. **Checklist Development**
 - Draft a comprehensive checklist based on findings and requirements.
 - Review and validate the checklist with relevant stakeholders.
 - Obtain necessary approvals.
7. **Distribution and Follow-Up**
 - Distribute the final checklist to the project team and client.
 - Schedule follow-up for progress checks or further assessments if required.

5. Documentation & Records

Document	Description	Retention Period
Site Assessment Report	Detailed observations and findings from the site assessment	5 Years

Client Requirement Notes	Documented interviews/meetings with client	5 Years
Risk & Compliance Checklist	Completed risk and compliance analysis	5 Years
Final Site Checklist	Approved checklist for project planning and execution	Project Duration + 5 Years

6. Review and Update

This SOP is to be reviewed annually or as needed based on regulatory, project, or client changes.

7. References

- Company Safety Policy
- Project Management Office Guidelines
- Applicable Industry Regulations & Standards

8. Appendix: Sample Checklist Template

Item	Description	Status (Yes/No/N.A.)	Remarks
Site Access Control	Entry/exits secured and documented		
Fire Safety Equipment	Extinguishers and alarms in place		
Client Special Requirements	Documented and communicated		
Regulatory Compliance	Site adheres to relevant standards		