SOP: Client Consultation and Requirements Gathering

This SOP details the process for **client consultation and requirements gathering**, covering initial client meetings, understanding business needs, identifying project objectives, collecting detailed requirements, validating and prioritizing client inputs, and documenting the requirements accurately. The goal is to ensure clear communication, align expectations, and establish a solid foundation for project planning and execution.

1. Purpose

To provide a standardized approach for consulting clients and gathering comprehensive, actionable requirements for projects.

2. Scope

This SOP applies to all team members involved in project initiation and client engagement phases.

3. Roles and Responsibilities

Role	Responsibilities
Project Manager	Leads client meetings, oversees process, ensures documentation accuracy.
Business Analyst	Conducts interviews, gathers requirements, validates and prioritizes inputs.
Client Stakeholders	Provide business context, clarify needs, validate documented requirements.
Technical Lead	Advises on technical feasibility and preliminary solutions.

4. Procedure

1. **Schedule and Prepare for Initial Client Meeting**
    - Arrange meeting with key client stakeholders.
    - Prepare agenda and information gathering tools (questionnaires, templates, etc.).
2. **Conduct Initial Consultation**
    - Introduce team, clarify project context and objectives.
    - Discuss client's business needs, challenges, and goals.
    - Take detailed notes of all discussions.
3. **Identify High-level Project Objectives**
    - Ask targeted questions to uncover key project goals and deliverables.
    - Document summary of objectives for client confirmation.
4. **Gather Detailed Requirements**
    - Conduct follow-up interviews, workshops, and surveys as necessary.
    - Document functional, non-functional, and technical requirements.
5. **Validate and Prioritize Requirements**
    - Share documented requirements with client for review and clarification.
    - Facilitate sessions to prioritize and resolve any conflicts.
6. **Document and Obtain Client Sign-Off**
    - Prepare the finalized requirements documentation.
    - Review with stakeholders for feedback and approval.
    - Obtain formal sign-off on requirements from authorized client representatives.
7. **Distribute and Store Documentation**

- Distribute the approved documentation to relevant team members.
- Ensure secure storage and version control for future reference.

5. Documentation Requirements

- Meeting agendas and minutes
- Requirements gathering templates (e.g., questionnaires, interview notes)
- Requirements specification document (functional and non-functional)
- Sign-off records

6. References

- Project Charter Template
- Business Analysis Guidelines
- Requirements Traceability Matrix

> **Note:** Regularly review and update requirements documentation throughout the project lifecycle to reflect any changes or additions.