SOP: Progress Reporting and Client Communication Guidelines

This SOP establishes **progress reporting and client communication guidelines** to ensure consistent, transparent, and timely updates on project status. It outlines the frequency, format, and channels of communication, roles and responsibilities for reporting, methods for addressing client inquiries and feedback, and procedures for documenting all communications. The objective is to foster clear and effective collaboration, manage client expectations, and support successful project outcomes through proactive information sharing and responsiveness.

1. Communication Frequency

Type	Frequency	Responsible Party
Status Updates	Weekly (every Friday by 5 PM)	Project Manager
Milestone Reviews	At completion of each major milestone	Project Manager/Lead
Ad-hoc Updates	As needed (critical issues, scope changes)	Project Manager
Client Queries/Feedback	Within 24 hours	Assigned Client Contact

2. Communication Channels

- Email (primary for formal updates and documentation)
- Project Management Tools (e.g., Asana, Jira, Trello) for task tracking and discussions
- Video/Audio Calls (e.g., Zoom, Teams) for milestone meetings and critical issues
- Instant Messaging (e.g., Slack, Teams) for quick clarifications

3. Reporting Format

- **Status Report Document** (PDF/Word or within PM tool)
    - Project Overview
    - Completed Tasks
    - In-Progress Tasks
    - Upcoming Tasks/Milestones
    - Issues & Risks
    - Requested Feedback/Decisions
- **Email Summaries** for ad-hoc updates and quick status checks
- **Meeting Minutes** (documented and shared within 24 hours of meetings)

4. Roles & Responsibilities

- **Project Manager:** Prepare and send regular reports, lead meetings, oversee all project communication.
- **Team Leads:** Contribute updates for their respective domains and raise any issues promptly.
- **Client Communication Point of Contact:** Main liaison for client queries, escalating or delegating as needed.
- **All Staff:** Document and share client-related discussions relevant to the project.

5. Addressing Client Inquiries & Feedback

1. Acknowledge all client inquiries within 24 hours.
2. Assign responsibility for responding or resolving each inquiry.
3. Provide a clear response or resolution timeline to the client.
4. Escalate complex issues to the Project Manager as needed.
5. Document all inquiries, actions taken, and outcomes.

6. Documentation Procedures

- Store all communication (emails, reports, meeting notes) in the designated project folder/repository.
- Ensure documentation is organized, dated, and accessible to authorized team members.
- Maintain a client communication log summarizing key interactions and outcomes.

7. Review & Continuous Improvement

- Review communication effectiveness quarterly as part of project retrospectives.
- Gather feedback from clients on reporting and communication processes.
- Update SOP as needed to reflect best practices and lessons learned.

8. References

- Project Management Handbook
- Client Service Policies
- Internal Communication Tools & Templates