

# SOP Template: Client Inquiry and Booking Confirmation Procedures

This SOP details the **client inquiry and booking confirmation procedures**, covering the process of handling client inquiries promptly, providing accurate information about services and availability, recording client details accurately, confirming bookings through clear communication, and ensuring all necessary documentation is completed. The aim is to enhance customer satisfaction, minimize booking errors, and streamline the appointment scheduling process for efficient service delivery.

## 1. Purpose

To ensure all client inquiries and bookings are handled professionally, efficiently, and accurately to improve customer experience and operational effectiveness.

## 2. Scope

This SOP applies to all staff members responsible for responding to client inquiries and handling bookings.

## 3. Responsibilities

Role	Responsibility
Front Desk/Reception	Respond to inquiries, record client details, update booking system, confirm bookings.
Manager/Supervisor	Oversee procedures, handle escalations, ensure compliance with policy.
Client	Provide accurate information for booking and respond to confirmation communications.

## 4. Procedure

- Inquiry Handling**
  - Acknowledge client inquiries (phone, email, web form, walk-in) within 1 business day.
  - Politely gather required information: client name, contact details, service requested, preferred dates/times.
  - Record all inquiry details in the designated booking system or log.
- Providing Information**
  - Clearly explain available services, pricing, and options to the client.
  - Verify and communicate current availability for requested dates/times.
  - Address any questions or concerns promptly and accurately.
- Client Details Recording**
  - Ensure client information is entered correctly and completely in the booking system.
  - Double-check contact details and specific booking preferences with client for accuracy.
- Booking Confirmation**
  - Confirm booking with client via their preferred communication channel (email, SMS, phone call).
  - Send booking details including date, time, service, location, and any preparatory instructions.
  - Attach or provide access to any required pre-appointment documentation or agreements.
- Documentation & Follow-Up**
  - Ensure all documentation is completed, signed, and filed as required.
  - Follow up 24-48 hours before appointment to reconfirm booking and answer any last-minute questions.
  - Update booking system with any confirmed changes or special requirements.

## 5. Documentation

- Client inquiry and booking log
- Booking confirmation templates (email/SMS/phone scripts)
- Pre-appointment forms/documents

**Note:** Any booking changes, cancellations, or complaints should be handled in accordance with the organization's established policies and documented appropriately.

## 6. Review and Improvement

This SOP should be reviewed annually, and updated as needed to reflect best practices or changes in operational requirements.