SOP Template: Client Inquiry and Project Intake Procedures

This SOP details the **client inquiry and project intake procedures**, encompassing the process of receiving and assessing client inquiries, gathering initial project requirements, conducting feasibility evaluations, documenting client information, and establishing clear communication channels. The objective is to ensure a streamlined and professional approach to onboarding new projects, enhancing client satisfaction and project success from the outset.

1. Purpose

To standardize the process of managing client inquiries and initiating new projects, ensuring consistency, accuracy, and professionalism in client interactions and project onboarding.

2. Scope

This SOP applies to all team members involved in client relations, sales, project management, and technical evaluation, from the initial inquiry to the confirmation of project onboarding.

3. Responsibilities

Role	Responsibility
Sales/Intake Specialist	Receives inquiries, gathers requirements, and acts as primary point of contact.
Project Manager	Oversees feasibility assessment and ensures smooth handoff and documentation.
Technical Lead	Reviews technical requirements and feasibility.
Client	Provides necessary information and responds to follow-up queries.

4. Procedure

1. **Receiving Client Inquiry**
    - Accept inquiry via email, web form, phone call, or in-person.
    - Acknowledge receipt within 1 business day.
2. **Initial Assessment**
    - Review inquiry for completeness and relevance.
    - Request missing information if necessary.
3. **Gathering Initial Project Requirements**
    - Schedule an introductory call or send a requirements questionnaire.
    - Collect information on project scope, goals, timeline, budget, stakeholders, and expected outcomes.
4. **Feasibility Evaluation**
    - Project Manager and Technical Lead review requirements for technical, financial, and resource feasibility.
    - Document risks, constraints, and preliminary estimates.
5. **Documentation**
    - Record all client and project information in the designated CRM or project management tool.
    - Ensure all communication is logged and accessible to relevant team members.
6. **Communication & Next Steps**
    - Send the client an intake summary, including next steps and expected timelines.
    - Assign a main point of contact for the client.
    - Set up channels (email thread, phone contact, shared portal, etc.) for ongoing communication.
7. **Handover & Onboarding**
    - Transition approved projects to the project kickoff phase per the project management SOP.

5. Documentation & Records

- Client Inquiry Form / Record
- Project Requirements Document

- Feasibility Assessment Notes
- Intake Summary Email
- CRM or Project Management Entries

6. Communication Guidelines

- Ensure all communication is timely, professional, and documented.
- Provide clear points of contact and response time expectations.
- Keep the client updated on status and next steps at each stage.

7. Review & Continuous Improvement

- Regularly review client feedback and project outcomes to refine intake procedures.
- Update this SOP annually or as needed to address workflow changes.

8. Revision History

Date	Revision	Description	Author
2024-06-11	1.0	Initial creation	SOP Team