SOP Template: Client Onboarding and Requirement Gathering

This SOP details the **client onboarding and requirement gathering** process, encompassing initial client engagement, needs assessment, documentation of client requirements, stakeholder communication, project scope definition, and setting clear expectations. The objective is to establish a comprehensive understanding of client needs, facilitate seamless collaboration, and ensure alignment between client goals and project deliverables for successful project execution.

1. Purpose

To ensure consistency and clarity in onboarding new clients and gathering their requirements, resulting in a shared understanding and smooth project commencement.

2. Scope

This SOP applies to all employees involved in client engagement, project management, business analysis, and related roles responsible for onboarding clients and compiling project requirements.

3. Responsibilities

- **Client Relationship Manager:** Initiates and manages the onboarding process.
- **Business Analyst:** Leads requirement gathering and documentation.
- **Project Manager:** Oversees the process, ensures deliverables, and manages communication.
- **Technical Lead/Team:** Provides input on feasibility and technical scope.

4. Glossary

Term	Definition
SOP	Standard Operating Procedure
Stakeholder	Any individual or group affected by or involved in the project
Requirements Gathering	Process of collecting project needs and expectations from stakeholders

5. Procedure

1. **Initial Client Engagement**
   - Respond to inquiry or referral promptly.
   - Schedule introductory meeting with client stakeholders.
   - Provide company overview and onboarding package (if applicable).
2. **Needs Assessment**
   - Conduct discovery meetings to understand client's business, objectives, and pain points.
   - Document high-level goals and identify key contacts.
3. **Requirement Gathering**
   - Use interviews, workshops, and questionnaires as needed to elicit requirements.
   - Record all functional, non-functional, and technical requirements.
4. **Documentation of Client Requirements**
   - Prepare a detailed Requirements Document or Statement of Work (SOW).
   - Share document with client for review and confirmation.
5. **Stakeholder Communication**
   - Identify all relevant stakeholders and their roles.
   - Establish communication plan and reporting schedule.
6. **Project Scope Definition**
   - Draft project scope statement based on documented requirements.
   - Review scope with client and internal teams for feasibility.
   - Obtain client sign-off on the defined scope.
7. **Setting Clear Expectations**
   - Outline project timelines, deliverables, and responsibilities.

    - Define success criteria and approval process.
    - Communicate escalation procedures for issues.
8. **Finalize Onboarding**
    - Confirm all onboarding documents received and signed.
    - Transition to project execution phase per agreed-upon plan.

6. Documentation & Records

- Client Intake Form
- Requirements Document/Statement of Work (SOW)
- Project Plan
- Communication Plan
- Meeting Notes & Sign-off Records

7. Review & Continuous Improvement

- Collect feedback from clients and internal teams post-onboarding.
- Review and update SOP annually or as needed.
- Maintain version control of SOP and all related documentation.