SOP Template: Client Inquiry Handling and Initial Consultation

This SOP defines the process for **client inquiry handling and initial consultation**, encompassing the receipt and timely response to client inquiries, effective communication strategies, information gathering to understand client needs, scheduling and conducting initial consultations, and documenting client interactions. The goal is to provide excellent service from the first contact, build client trust, and establish a clear understanding of project requirements to ensure successful client engagement and satisfaction.

1. Purpose

To standardize procedures for handling client inquiries and conducting initial consultations, ensuring consistency, professionalism, and client satisfaction.

2. Scope

This SOP applies to all team members responsible for customer service, client communications, and consultations.

3. Responsibilities

- **Client Services Team:** Promptly respond to client inquiries.
- **Consultants/Managers:** Schedule and conduct initial consultations.
- **All Team Members:** Document client interactions accurately.

4. Procedures

1. **Inquiry Receipt**
    - Receive client inquiries via phone, email, website, or in-person.
    - Log each inquiry in the Client Inquiry Register with timestamp and contact details.
2. **Initial Response**
    - Acknowledge receipt of inquiry within **1 business day**.
    - Provide basic information and next steps, if applicable.
3. **Information Gathering**
    - Ask qualifying questions to understand client needs and expectations.
    - Record key details (project scope, timeline, budget, contact info).
4. **Scheduling Consultation**
    - Offer consultation slots or accept preferred timing from client.
    - Send calendar invite and confirmation email with details (time, platform/location, participants).
5. **Conducting Initial Consultation**
    - Prepare agenda based on gathered information.
    - Introduce team and outline consultation objectives.
    - Discuss client needs, expectations, and answer queries.
    - Document key discussion points and agreed next steps.
6. **Post-Consultation Follow-up**
    - Send summary and next steps to client within **2 business days**.
    - Update client records and assign action items as needed.
7. **Documentation**
    - Maintain records of all interactions in the CRM or designated database.
    - Ensure confidentiality and data protection according to company policy.

5. Communication Guidelines

- Maintain professionalism and courtesy at all times.
- Use clear, concise, and positive language.
- Ensure all written communication is free from errors.

6. Documentation & Records

Document/Record	Location	Retention Period
Client Inquiry Register	CRM/Share Drive	3 years
Consultation Notes	CRM/Client File	3 years
Email Correspondence	Email Server/CRM	3 years

7. Review & Continuous Improvement

- Review the SOP annually or as needed.
- Collect feedback from clients and staff to improve the process.
- Update procedures in line with best practices.

8. References

- Company Communication Policy
- Data Privacy & Confidentiality Policy