

SOP: Client Requirement Analysis and Job Order Confirmation

This SOP details the process of **client requirement analysis and job order confirmation**, encompassing the systematic collection and evaluation of client needs, clarification of project specifications, feasibility assessment, preparation of detailed proposals, and formal confirmation of job orders. The objective is to ensure a clear understanding between the client and service provider, minimize misunderstandings, and establish a solid foundation for project execution through transparent communication and documented agreement.

Scope

This SOP applies to all staff responsible for managing client inquiries, gathering requirements, preparing proposals, and confirming job orders.

Responsibility

- Sales/Account Managers: Initial client engagement, requirements gathering
- Project Managers: Technical feasibility and proposal review
- Management: Approval of proposals and job confirmations

Procedure

- 1. Client Engagement and Requirement Gathering**
 - Initiate contact with the client via agreed communication channel (email, meeting, call, etc.).
 - Use a standardized template or checklist to document client needs and expectations.
 - Clarify ambiguous requirements with targeted questions.
 - Record all requirements in the client requirement analysis form.
- 2. Review and Clarification**
 - Schedule a follow-up meeting to review documented requirements with the client.
 - Address any discrepancies or unclear points.
 - Update the requirement analysis form as needed.
- 3. Feasibility Assessment**
 - Coordinate with technical and operational teams to evaluate the feasibility of client requirements.
 - Identify potential risks, resource allocations, and timelines.
 - Document findings and recommendations.
- 4. Proposal Preparation**
 - Draft a comprehensive proposal including project scope, deliverables, timelines, pricing, and terms.
 - Review proposal internally for accuracy and compliance.
 - Send the proposal to the client for review and feedback.
- 5. Job Order Confirmation**
 - Upon client acceptance, issue a formal Job Order or Contract for signature.
 - Obtain signed confirmation from the client.
 - Store all documents in the designated project repository.
- 6. Kickoff Readiness**
 - Assign project team and schedule kickoff meeting.
 - Distribute finalized documentation to all stakeholders.

Documentation & Records

Document	Responsible	Storage Location
Client Requirement Analysis Form	Account Manager	Client File / CRM
Feasibility Assessment Report	Project Manager	Project Folder
Proposal Document	Account Manager / Management	Client File / CRM
Signed Job Order/Contract	Account Manager	Document Repository

Revision History

Version	Date	Description	Author
1.0	2024-06-10	Initial Release	[Your Name]