### **CLIENT CONTRACT EXECUTION**

**Department:** Business Development  
**SOP ID:** BDM-2025-07

#### **1. OBJECTIVE**

To standardize the client contract execution process, ensuring systematic capture of client requirements, layout finalization, proposal communication, agreement generation, deposit collection, document verification, and interdepartmental rollout for seamless onboarding.

#### **2. SCOPE**

This SOP applies to:

* Business Development Managers (BDMs) managing client requirements, proposals, and agreements
* Layout Team responsible for creating client-specific layouts
* Projects Department for timeline confirmations
* Legal Department for agreement verification and signing
* Client Relations (CR) and Billing Teams for onboarding coordination

#### **3. DEFINITIONS**

* **Service Agreement:** Formal contract outlining services, pricing, timelines, and terms agreed upon with the client.
* **Service Agreement Form:** Document capturing all necessary client details for agreement generation.
* **Standard Deposit:** 25% of the total contract value collected upfront before onboarding initiation.
* **Layout Proposal:** Visual plan of the client’s chosen space layout developed by the Layout Team.
* **Active Prospect:** A potential client who has visited the property and expressed intent to proceed.

#### **4. ROLES AND RESPONSIBILITIES**

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| **Role** | **Responsibility** |
| BDM | Capture client requirements, coordinate with Layout Team, communicate proposals, collect deposit, initiate MAF, generate Service Agreement, manage negotiations, collect documents, and finalize onboarding |
| Layout Team | Develop and share layout proposals based on client requirements |
| Projects Department | Confirm execution timelines to include in proposals after coordinating with IT and Facility department |
| Legal Department | Review and sign Service Agreements within 1 business day post-client signing |
| CR and Billing Teams | Receive finalized onboarding rollout communication and prepare respective setups |

#### **5. PROCEDURE**

**Step 1: Capture Client Requirements**

* **Responsibility:** BDM
* For each active prospect visiting the property, capture all requirements (e.g. area needed, fit-out specifications, seating layout preferences and Budget)

**Step 2: Layout Coordination**

* **Responsibility:** BDM
* Upon the discussed requirement, coordinate with the Layouts Team to create a customized layout.
* Review the draft layout for accuracy and share it with the client for confirmation.

**Step 3: Proposal and Timeline Communication**

* **Responsibility:** BDM
* Upon client layout confirmation via Outlook, prepare and send a commercial proposal including:
  + Final price
  + Execution timeline (confirmed by Projects Department)
* Ensure clear communication of inclusions, exclusions, and terms in the proposal email.

**Step 4: Client Confirmation**

* **Responsibility:** BDM
* Obtain client’s confirmation on the final price and approved layout.
* Record confirmation details in ERP.

**Step 5: Deposit Collection**

* **Responsibility:** BDM
* Request the standard deposit (25% of total value) to initiate the Project works and onboarding processes.
* BDM Confirms receipt of deposit with the accounts department before proceeding further.
* Trigger the initial internal rollout upon receiving the token deposit. (by CR team)

**Step 6: MAF Form Sharing**

* **Responsibility:** CR Team and BDM
* Share the SA form link with the client to capture all necessary details required for agreement generation.
* Follow up within 2 business days if not received.
* **Reference Check:** Conduct reference checks for Sole Proprietor firms after SA submission.

**Step 7: Service Agreement Generation**

* **Responsibility:** CR Team and BDM
* Generate the Service Agreement in ERP using SA data.
* Share with the client to sign and address any clarification.

**Step 8: Client Negotiation**

* **Responsibility:** Client onboarding Team and BDM
* If the client raises issues regarding agreement terms (e.g. termination clauses, additional fees, add-ons), initiate negotiation discussions.
* Update ERP with final agreed terms and reissue the revised agreement promptly.

**Step 9: Final Agreement Sharing**

* **Responsibility:** CR Team and BDM
* Obtain company authorized signature on the agreement within 1business day upon receiving the client signed agreement.
* Share the final executed agreement with the client after receiving 100% deposit.

**Step 10: Client Document Collection**

* **Responsibility:** Client onboarding Team and BDM
* Collect mandatory documents based on client company type:  
  **For LLP, Private, and Public Companies:**
  + Aadhar Card (Authorized Signatory)
  + Company PAN Card
  + PAN Card of Authorized Signatory
  + Certificate of Incorporation
  + GST Certificate
* For Sole proprietor
  + Aadhar Card
  + PAN Card
  + MSME Certificate
  + GST Certificate (if available)
* For Partnership
  + Aadhar Card
  + PAN Card
  + Partnership Deed
  + Company PAN Card
  + GST Certificate
* For Trusts
  + Trust PAN Card
  + Aadhar Card
  + PAN Card
* For NRI authorized Signers
  + Passport (compulsory)
* Upload and update all collected documents in ERP verification TAB.

**Step 11: Final Rollout Communication**

* **Responsibility:** CR team.
* Mail finalized plans, signed agreements, and all onboarding documents to Legal, Client Relations, and Billing teams of the respective building for onboarding execution.

#### **6. EXCEPTION MANAGEMENT**

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| **Scenario** | **Action** |
| Client delays MAF submission beyond 2 days | Send reminder on Day 2; escalate to TL of Business Development by Day 5 |
| Legal signing delayed beyond 1 business day by BDM | Escalate to TL of BDM |
| Client disputes agreement terms | Initiate negotiations immediately and try to resolve within 3 business days |
| Documents incomplete or missing | Follow up within 1 business day; escalate to TL of Business Development by Day 3 |
| Reference check issues for Sole Proprietor firms | Escalate to Compliance and TL of Business Development immediately |
| Legal signing delayed beyond 3 business days by the client post Negotiation | Send a reminder to the client post 3 days, in case the client delays it by 7 days, escalate it to the TL of BDM |
| The client asks for an urgent need of the office | Propose a temporary office space to the client until their office space is ready |
| During the reference check for a sole proprietorship client, suspicious activities were identified. | Escalate the matter to the TL of BDM and let them decide whether to onboard the prospect. |

#### **7. KEY PERFORMANCE INDICATORS (KPIs)**

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| **Process Area** | **Target** |
| Requirements Capture and Layout Proposal | Within 3 business days of client visit |
| Proposal Sharing | Within 1 business day post layout confirmation |
| Deposit Collection | Within 3 business days post proposal acceptance |
| MAF Form Collection | Within 2 business days |
| Agreement Execution (end-to-end) | Within 7 business days |
| Legal Signing | Within 1 business day post-client signing |
| Final Rollout Communication | Same business day post final agreement |

#### **8. TOOLS USED**

* ERP System: Requirement logging, layout approval, agreement generation, and document uploads
* Microsoft Outlook: Client communication and internal rollout mails
* Internal Document Templates: MAF form, layout proposals, service agreement templates

#### **9. ESCALATION AND TROUBLESHOOT MATRIX**

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| **Issue** | **First Contact** | **Escalation 1** | **Escalation 2** |
| MAF not submitted within 2 days | BDM | Team Lead | TL of Business Development |
| Delay in legal signing | BDM | Legal POC | TL of Legal |
| Agreement disputes unresolved in 3 days | BDM | Team Lead | TL of Business Development |
| Missing client documents | BDM | Team Lead | TL of Business Development |
| Reference check issues | BDM | Compliance Team | TL of Business Development |

#### **10. REVIEW AND REVISION HISTORY**

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| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** | **Approved By** |
| 1.0 | 2025-06-27 | Initial SOP for BDM Contract Execution | Khushi Kaushik – Operations Executive | TL of Business Development |