**Client Office Tour Standard Operating Procedure (SOP)**

**Department- BDM**

**Sub-department- Leasing**

**SOP ID-**

Objective

To establish a standardized, professional, and engaging process for conducting client office tours, ensuring seamless space preparation, strategic tour execution, effective client engagement, and comprehensive post-visit communication while addressing client needs and maintaining compliance with organizational policies.

Scope

This SOP applies to:

* All prospective clients visiting Novel’s office spaces for tours.
* Business Development Managers (BDMs), Facility Team, IT Department, and Admin Team involved in client tours.
* Activities including space preparation, tour execution, client engagement, and post-visit follow-up.

Applicable for:

* Business Development Team
* Facility Team
* IT Department
* Admin Team
* Prospective Clients

Definitions

* Client Tour: A guided visit of Novel’s office spaces, showcasing facilities, amenities, and services to prospective clients.
* **Business Development Manager (BDM)**: The primary point of contact responsible for conducting tours, engaging clients, and resolving all queries.
* **Space Readiness**: The process of ensuring office spaces, common areas, and amenities is clean, functional, and visually appealing before a client tour.
* **ERP System**: Novel’s internal system for managing client data, tour schedules, and follow-up communication.
* **Shift Pass**: A service allowing two employees to share one desk in alternate shifts, including an additional RFID access card.

Roles and Responsibilities

* **Business Development Manager (BDM)**:
  + Schedule and conduct client tours, ensuring a strategic flow and tailored engagement.
  + Address client needs and provides detailed information on services, pricing, and customization options.
* **Facility Team**:
  + Inspect and prepare tour areas (offices, common areas, amenities) to ensure cleanliness, functionality, and aesthetic appeal.
  + Arrange seating, workplace logistics, and demo areas as required.
  + Address maintenance issues promptly or escalate as needed.
* **IT Department**:
  + Validate feasibility for client-specific technical requirements (e.g., server rooms, AC positioning).
* **Projects Department**
* Help validate client regarding table size and all other queries related to projects.
* **Electrical Department**
* Help clarify the doubts regarding all the electrical technicalities.
* **Prospective Clients**:
  + Provide details on team size, technical requirements, and preferences prior to the tour.
  + Engage with BDMs during the tour to discuss needs and preferences.

Step-by-Step Process

1. **Schedule and Confirm Client Tour**:
   * BDM confirms the tour date, time, and client requirements (e.g., team size, Vastu compliance, technical needs) via ERP system.
   * Notify Facility, Projects, electrical and IT Teams at least 48 hours in advance to prepare the space. (wherever applicable)
2. **Prepare Space for Client Visit**:
   * Facility Team inspects tour areas to ensure:
     + Offices are clean, tidy, well-lit, and odor-free.
     + Common areas (lobbies, lounges, pantries) are welcoming and fully functional.
     + Amenities (meeting rooms, elevators, internet connectivity) are operational.
   * Stage demo areas strategically (e.g., open a conference room with lights on to showcase functionality).
   * Address minor maintenance issues (e.g., cleaning, repairs) immediately or escalate to Facilities for resolution.
   * Provide covered, secure parking with surveillance and lighting, allocated based on team size and charged as a bundled or separate service.
   * Ensure daily cleaning of private offices and shared spaces, with access to RO-purified water, shared pantries, and professional waste disposal included in the base package.
3. **Plan the Tour Flow**:
   * BDM designs a strategic tour path tailored to client needs:
     + Start with high-impact areas (e.g., lobby for branding-focused clients, premium cabins for Vastu preferences, or server rooms for IT-focused clients).
     + Follow a logical sequence: reception → cabins → meeting rooms → amenities → breakout spaces → parking/access and cafeteria.
   * Allocate 30–45 minutes for the tour, pacing to allow natural pauses for discussions.
   * Prepare to explain higher prices for facade-facing or East-facing spaces due to high demand for natural light, external views, and Vaastu compliance, which is standard industry practice.
   * Highlight flexibility for mid-contract layout reconfiguration for team expansion or downsizing, subject to feasibility and minimal charges.
4. **Conduct the Tour**:
   * Greet the client at reception
   * If the client is a walk in, then the FOE will inform the BDM, and the BDM will take all the information during the visit and later mail the data team to create a lead otherwise the data team will inform if it is a duplicate lead.
   * Begin with the most relevant area such as the receptions and meeting rooms to create a strong first impression.
   * Highlight key features tailored to client needs, including:
     + **Space Customization**: Offer partially furnished units for larger deals, allowing clients to bring their own elements, subject to approval.
     + **Technology**: Provide shared high-speed internet for standard operations, with support for dedicated leased lines via approved vendors for clients needing guaranteed bandwidth or data security (e.g., BPOs, financial institutions). Explain UPS sockets for general devices (laptops, monitors) with power backup, and raw power sockets for high-load equipment (e.g., servers, 3D printers) at ₹299/month per socket or metered for high consumption.
     + **Security**: Offer 24/7 shared building security, with options for private security, biometric access, CCTV, or locker rooms via approved vendors for clients with sensitive operations (e.g., finance, healthcare).
     + **Branding**: Allow internal branding outside office doors; lobby or façade signage requires approval and incurs higher costs to maintain aesthetics.
     + **Shift Operations**: Offer a Shift Pass at ₹1,500/month for two employees sharing one desk in +alternate shifts, popular with call centres and BPOs.
     + **Cafeteria**: Provide access to cafeterias during standard hours, with vendor coordination for night shifts if minimum daily requirements are committed. Pricing and hygiene are regulated for employee-friendly standards.
     + **NOTE**: Inform clients about the land enabled and the Wi-Fi system based on the location of the property  
       NOM, NBP, NTP- Land enabled and the Wi-Fi will be an extra cost
     + **Different Desk Sizes**- please refer [SOP About Product Knowledge.docx](https://novelteam.sharepoint.com/:w:/r/sites/Noveloffice/Shared%20Documents/Operations/MR/BDM/To%20be%20Reviewed/SOP%20About%20Product%20Knowledge.docx?d=wae1a418ddf6644b3ae5bd3f48e52d1ba&csf=1&web=1&e=vDolIP)
   * Adjust the tour dynamically based on client reactions, spending more time on areas of interest or addressing concerns promptly (e.g., parking costs, customization fees).
   * Confirm technical feasibility for specific requirements (e.g., server rooms with static-resistant flooring and dedicated cooling, split AC installations subject to distance constraints) by looping in IT or HVAC experts during or post-tour.
5. **Conclude the Tour**:
   * Summarize key features discussed, emphasizing Novel’s value (e.g., owned buildings for faster decision-making, modular layouts, dedicated client managers, and 24/7 facility support for issues like AC, lighting, or internet).
   * Invite final discussions and provide contact details for follow-up.
   * Escort the client to reception, ensuring smooth departure via the internal directory and visitor management system.
6. **Post-Visit Communication**:
   * Within 24 hours, BDM sends a follow-up email via outlook if it's a marketing team lead, including:
     + A thank-you note for visiting for the clients that come through marketing
     + A summary of discussed features.
     + Next steps (e.g., customized proposal, technical validation, contract discussion).
   * Log client requirements in the ERP system for reference.
   * Coordinate with IT or Facility Teams to provide detailed proposals for technical or customization requests (e.g., leased lines, biometric systems) within one business days.

Exceptions

* Space Readiness Issues:
* **Scenario**: Tour areas are not ready due to maintenance delays (e.g., cleaning incomplete, technical equipment malfunctioning, or aesthetic issues like damaged furniture).
* **Solution**: BDM escalates to the Facility Team for immediate resolution. If unresolved, adjust the tour path to showcase fully functional areas, apologize to the client for the inconvenience, and offer a follow-up tour or virtual walkthrough of the affected areas once resolved.
* Client Delays or No-Show:
* **Scenario**: A client is significantly delayed or fails to arrive for the scheduled tour.
* **Solution**: BDM attempts contact within 24 hours via phone or email to reschedule within one week. If the client remains unresponsive, log the issue in the ERP system, pause follow-up, and update the lead status.
* Unresolved Technical Requirements:
  + If technical feasibility (e.g., server room setup, split AC installation) cannot be confirmed during the tour, BDM escalates to IT for validation and updates the client.
* Customization or Pricing Concerns:
* **Scenario**: Clients request unique arrangements, such as hybrid furnishing models, discounted parking fees, or non-standard lease terms.
* **Solution**: BDM escalates to management for approval of customized solutions. Provide the client with a written summary of standard offerings and note that bespoke solutions are under review, with a response expected within two business days.
* Visitor Access Issues:
  + If unregistered visitors accompany the client, Admin Team restricts access to the lobby and notifies BDM for approval.
* Client Dissatisfaction with Pricing
* **Scenario**: A client expresses concerns about pricing (e.g., facade-facing space costs, Shift Pass fees, or additional services like private security) during the tour.
* **Solution**: BDM explains the value proposition (e.g., premium location benefits, industry-standard pricing, or bundled services) and offers to provide a detailed cost breakdown in the follow-up proposal. Escalate to management for potential discounts or bundled offerings if the client shows strong interest.
* Health and Safety Concerns
* **Scenario**: A client raises concerns about health and safety (e.g., inadequate fire exits, poor ventilation, or lack of sanitization) during the tour.
* **Solution**: BDM addresses concerns by highlighting existing safety measures (e.g., fire safety certifications, regular sanitization protocols) and escalates to the Facility Team for immediate inspection if needed. Provide the client with a detailed safety compliance report in the follow-up communication.
* Conflicting Team Priorities
* **Scenario**: The IT, Electrical, or Facility Teams prioritize other operational tasks over tour-related requests (e.g., urgent maintenance or internal projects), delaying space preparation or technical validations.
* **Solution**: BDM escalates to department heads with a clear timeline for tour requirements, emphasizing client priority. Implement a pre-tour coordination meeting 48 hours in advance with all teams to align schedules and resources, logging outcomes in the ERP system to ensure accountability.
* Technical Disruptions During Tour
* **Scenario**: Technical issues, such as Wi-Fi downtime, elevator malfunctions, or power outages, occur during the tour, disrupting the client experience.
* **Solution**: BDM apologizes to the client, briefly explains the issue as an isolated incident, and redirects the tour to unaffected areas. Escalate to IT or Facility Team for immediate resolution and offer a follow-up tour or virtual demonstration of impacted amenities if needed.

Tools and Resources

* **ERP System**: Novel’s internal ERP for scheduling tours, logging client data, and managing follow-up communication.
* **Communication Tools**: Outlook for sending follow-up emails and coordinating with clients.
* **Document Storage**: ERP for storing client tour notes, feedback, and proposals.
* **Technical Validation Tools**: IT and HVAC team checklists for validating client-specific requirements (e.g., server rooms, AC positioning).
* **Vendor Network**: Pre-approved vendors for additional services (e.g., biometric systems, private security, leased lines, cafeteria coordination for night shifts).

Review and Revision History

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| **Version** | **Changes Made** | **Updated By** | **Date** | **Next Review** |
| 1.0 | Initial SOP Created | Operations (Shivli Doneria) | 27 June 2025 |  |