**Client Requirements Documentation SOP**

**Department:** Business Development  
**Sub-department:** Leasing   
**SOP ID:**

**Objective**

To establish a standardized process for capturing, documenting, and communicating client requirements during initial interactions at Novel Office, ensuring accuracy, clarity, and efficient follow-up to support client satisfaction and deal closure.

**Scope**

This SOP applies to:

* All client interactions where requirements are gathered, including office tours, realtor-led visits, or inquiries facilitated by the marketing team across Novel Office properties (NTP, NBP, NOB, NOW, NOM, NOQ, NOC).
* Requirements capture for prospective clients, whether communicated directly or via realtors.
* Applicable for:
  + Business Development Managers (BDMs)
  + Sales and Marketing Team
  + Realtors (Tier 1, Tier 2, Tier 3)
  + Prospective Clients

**Definitions**

* **Client Requirements**: Specific needs and preferences of a client regarding office space, including seat count, layout, amenities, technical specifications, budget, timeline, and other considerations (e.g., Vastu compliance, branding).
* **BDM**: Business Development Manager, the primary point of contact responsible for engaging clients and documenting requirements.
* **Realtor**: An intermediary (e.g., JLL, CBRE, SpaceHunt) facilitating client visits or inquiries, as defined in the Realtor Relationship Management SOP.
* **ERP System**: Novel’s internal Enterprise Resource Planning system for managing client data, leads, and requirements ([ERP](https://erpnoveloffice.in/)).
* **Lead**: A prospective client or inquiry logged in the ERP system under a unique identifier.

**Roles and Responsibilities**

1. **Business Development Manager (BDM)**:
   * Engage clients during office hours or visits to gather detailed requirements.
   * Document requirements accurately and send confirmation emails to clients or realtors, as applicable.
   * Log requirements and comments in the ERP system under the client’s lead profile.
   * Coordinate with the Data Team to ensure lead accuracy and avoid duplication.
   * Follow up with clients or realtors to clarify or confirm requirements.
2. **Sales and Marketing Team**:
   * Provide initial client inquiries from marketing efforts to BDMs via ERP or WhatsApp chat.
3. **Realtors**:
   * Communicate client requirements to BDMs during visits or via outlook.
4. **Data Team**:
   * Verify lead details in ERP to prevent duplication for walk-in or marketing team leads.
   * Notify BDMs of duplicate leads or discrepancies within 24 hours.
5. **Clients**:
   * Provide clear and detailed requirements during tours or interactions.
   * Confirm or clarify requirements upon receiving BDM’s email.
   * Communicate preferences for direct or realtor-mediated correspondence.

**Standard Procedure**

**1. Initial Requirements Gathering**

* **Process**:
  + During the client office tour (as per Client Office Tour SOP) or realtor-led visit, the BDM engages the client to gather requirements (which are not mentioned in the ERP) , including but not limited to:
    - Number of seats (e.g., workstations, cabins, meeting rooms).
    - Space preferences (e.g., open plan, private cabins, Vastu compliance).
    - Technical needs (e.g., high-speed internet, server rooms).
    - Electrical requirements (e.g., UPS sockets, raw power for equipment).
    - Amenities (e.g., parking, cafeteria access, security).
    - Budget range and timeline for move-in.
    - Branding or customization needs (e.g., signage, logo placement).
  + The BDM actively listens, asks clarifying questions, and takes mental or written notes to ensure all client needs are captured.
  + For walk-in clients, the Front Office Executive (FOE) makes the client scan the QR this helps populate the data of that client in the backend and then the FOE notifies the BDM, who collects requirements during the tour
  + For realtor-led visits, the BDM confirms with the realtor whether communication should proceed directly with the client or through the realtor.
* **Timeline**: Requirements gathered during the visit or tour.

**2. Requirement Confirmation Email**

* **Process**:
  + Within 24 hours post-visit, the BDM drafts a confirmation email summarizing the client’s requirements.
  + **Email Scenarios**:
    - **Marketing Team Leads**: If the inquiry originates from the Marketing Team, the BDM sends the email directly to the client, addressing them by name and referencing the tour or inquiry. The email includes:
      * A thank-you note for visiting or engaging with Novel Office.
      * A detailed list of captured requirements (e.g., seat count, technical needs).
      * A request for confirmation or clarification of listed requirements.
      * Next steps (e.g., technical discussion, proposal preparation).
    - **Realtor-Led Visits**:
      * If the realtor specifies direct client communication, the BDM sends the email to the client, copying the realtor, with the same structure as above.
      * If the realtor prefers mediated communication, the BDM sends the email to the realtor only, requesting confirmation or client feedback.
  + The BDM ensures the email is professional, concise, and tailored to reflect the client’s priorities.

**3. ERP Documentation**

* **Process**:
  + The BDM logs the client’s requirements in the ERP system under the client’s lead profile within 24 hours of the visit (if the requirements were not complete or there is some change).
  + Steps for ERP entry:
    1. Access ERP: Navigate to Leads → Search by Client Name or ID.
    2. Open Lead Profile: Select the relevant lead.
    3. Update Requirements: Enter detailed requirements in the “Space Plan” or “Client Notes” tab, including:
       - Seat count and layout preferences.
       - Technical and electrical specifications.
       - Budget, timeline, and other preferences (e.g., Vastu, branding).
    4. Add Comments: Include specific comments to guide follow-up actions, formatted as:
       - “Client requires 20 workstations, 1 MD cabin, 1 4-seater meeting room, high-speed internet, and 4 raw power sockets. Prefers East-facing space for Vastu. Budget: ₹10,000/seat. Move-in 1 month.”
    5. Save and Notify
  + The BDM ensures all requirements are logged accurately to prevent miscommunication during follow-ups.

**4. Client or Realtor Confirmation**

* **Process**:
  + The BDM follows up with the client or realtor within 24 hours of sending the confirmation email to verify accuracy of captured requirements.
  + If the client/realtor confirms, the BDM proceeds with next steps (e.g., technical discussion per IT and Electrical Requirements Discussion SOP).
  + If the client/realtor requests clarifications or modifications, the BDM:
    - Schedules a call or meeting within 2 business days to discuss changes.
    - Updates requirements in ERP based on feedback, adding comments (e.g., “Client revised seat count to 25, added server room requirement”).
    - Sends a revised confirmation email within 24 hours of discussion.
  + The BDM logs all follow-up interactions in ERP for traceability.

**Key Performance Indicators (KPIs)**

* Capture and email client requirements within 24 hours of visit in ≥95% of cases.
* Achieve ≥90% of requirements confirmed without revisions.
* Document requirements in ERP within 24 hours of visit in 100% of cases.
* Secure client/realtor response to confirmation emails in ≥90% of cases within 5 business days.

**Exceptions**

1. **Client Provides Incomplete Requirements**:
   * **Scenario**: Client is unsure or provides vague requirements during the tour.
   * **Resolution**: BDM schedules a follow-up call within 24 hrs to clarify needs, logging partial requirements in ERP with a comment (e.g., “Awaiting client clarification on seat count”). A revised confirmation email is sent post-call.
2. **Realtor Delays Communication**:
   * **Scenario**: Realtor fails to confirm requirements or relay client feedback within 5 business days.
   * **Resolution**: BDM escalates to realtor’s secondary contact, copying Sales Team lead, and logs in ERP. If direct client communication is permitted, BDM contacts client directly.
3. **Duplicate Lead Identified**:
   * **Scenario**: Data Team flags a walk-in or marketing lead as a duplicate.
   * **Resolution**: BDM informs the data team to merges requirements into the existing lead within 24 hours, notifying client/realtor of updated communication.
4. **ERP System Downtime**:
   * **Scenario**: ERP is inaccessible, preventing requirement logging.
   * **Resolution**: BDM records requirements in a temporary Google Sheet and updates ERP within 24 hours of system restoration.
5. **Client Unresponsiveness**:
   * **Scenario**: Client does not respond to confirmation email or follow-up attempts within 5 business days.
   * **Resolution**: BDM sends a final escalation email on day 5, offering to pause the lead.
6. **Overlapping Requirements from Multiple Client Representatives**

* **Scenario**: Multiple representatives from the same client (e.g., CEO and IT manager) provide conflicting requirements (e.g., differing seat counts or budget expectations), creating ambiguity.
* **Solution**: The BDM documents all provided requirements in ERP with clear attribution (e.g., “CEO: 30 seats, ₹12,000/seat; IT Manager: 25 seats, ₹10,000/seat”). The BDM schedules a joint clarification call with all representatives within 2 business days, copying the realtor if applicable, and sends a consolidated confirmation email post-call. The ERP is updated with the finalized requirements to ensure consistency.

1. **Incorrect Data Entry by BDM**

* **Scenario**: The BDM enters incorrect or incomplete requirements in ERP (e.g., wrong seat count, missing technical needs) due to oversight or misunderstanding, risking miscommunication in follow-ups.
* **Solution**: The BDM corrects errors within 24 hours, notifies the client/realtor of the updated requirements via email, and logs a comment in ERP (e.g., “Corrected seat count from 20 to 25 per client feedback”). The BDM undergoes refresher training on ERP data entry protocols if errors persist.

1. **Client Requests Urgent Timeline**

* **Scenario**: The client demands an accelerated move-in timeline (e.g., within 1 week) that conflicts with standard processes for technical validation or customization, leading to subjective prioritization by the BDM.
* **Solution**: The BDM logs the urgent timeline in ERP with a comment (e.g., “Client requests move-in by [date]; feasibility pending”). The BDM escalates to the Facility, IT, and Electrical Teams for a rapid feasibility assessment within 1 business day, coordinating with management for resource prioritization. The client/realtor is informed of the feasibility outcome via email, with alternative timelines or solutions if the request cannot be met.

**Tools and Resources**

* **ERP System**: For logging leads, requirements, and tracking KPIs ([ERP](https://erpnoveloffice.in/)).
* **Communication Tools**: Outlook for client/realtor emails, Microsoft Teams for internal coordination, Google Calendar for scheduling follow-ups.

**Review and Revision History**

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| --- | --- | --- | --- | --- |
| **Version** | **Changes Made** | **Updated By** | **Date** | **Future Review** |
| 1.0 | Initial SOP Created | Shivli Doneria  Operations Department | 25-Jun-2025 |  |

*Login to ERP using employee credentials to access the link.*