# **POST-DEAL CLIENT FOLLOW-UP**

**Department:** Business Development  
 **SOP ID:** BDM-2025-09

## **1. OBJECTIVE**

To standardize the post-deal client follow-up process, ensuring that Business Development Managers (BDMs) effectively manage and resolve any client concerns after the space handover. This process will ensure timely communication, proper resolution of issues, and client satisfaction post-onboarding.

## **2. SCOPE**

This SOP applies to:

* **Business Development Managers (BDMs):** Responsible for managing post-deal client follow-up, handling client concerns, and updating the Client Relations (CR) team for further resolution.
* **Client Relations (CR) Team:** Responsible for resolving client concerns by coordinating with internal teams and providing updates to the BDM.
* **Facilities, Projects, and IT Teams:** Responsible for addressing any issues that arise during post-deal follow-up.

## **3. DEFINITIONS**

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| **Term** | **Definition** |
| **Post-Deal Concerns:** | Issues, requests, or feedback from the client regarding the office space or services after the deal has been closed and the client has been onboarded. |
| **Client Communication:** | The exchange of information between the BDM, CR team, and the client, ensuring that the client’s concerns are addressed effectively. |

## **4. ROLES AND RESPONSIBILITIES**

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| **Role** | **Responsibility** |
| **BDM** | Manages client concerns post-deal, communicates with CR, and ensures solutions are implemented. Updates the client with the final resolution. |
| **CR Team** | Coordinates with the BDM to resolve client concerns by liaising with internal departments. Keep the BDM updated on progress. |
| **Facilities/Projects/IT Teams** | Address and resolve any issues raised by the client regarding their office space. |

## **5. PROCEDURE**

### **Step 1: Client Raises Concerns**

**Responsibility:** BDM

* **Client Approach:**
  + The client approaches the BDM directly with any post-deal concerns or requests.
  + The BDM listens carefully to the client’s issues, ensuring that all aspects are clearly understood.

### **Step 2: Document Client Concerns**

**Responsibility:** BDM

* **Email Communication:**
  + The BDM sends an email to the CR team detailing the client’s concerns, including any specific requests or issues that need to be addressed.
  + This email should include relevant context, such as the client’s specific requirements and expectations.

### **Step 3: CR Team Coordination**

**Responsibility:** CR Team

* **Coordinate with Departments:**
  + The CR team works with the respective departments (Facilities, Projects, IT, etc.) to resolve the client’s concerns.
  + CR ensures that the relevant departments understand the urgency and requirements of the client.
* **Status Update to BDM:**
  + The CR team provides timely updates to the BDM on the progress of resolving the concerns.
  + If the issues require extended time or additional resources, CR keeps the BDM informed and adjusts timelines accordingly.

### **Step 4: Resolve Client Concerns**

**Responsibility:** Facilities/Projects/IT Teams & CR Team

* **Issue Resolution:**
  + Internal departments work to resolve the client’s concerns (e.g., space adjustments, technical support, and facilities fix).
  + The CR team ensures that all aspects are addressed according to the client’s requirements.
* **Final Resolution Update:**
  + Once all concerns have been addressed, the CR team sends a final update to the BDM with all actions taken and outcomes.

### **Step 5: BDM Communication with Client**

**Responsibility:** BDM

* **Client Update:**
  + The BDM contacts the client to inform them of the solutions implemented and updates the client on the status of their concerns.
  + If any further adjustments are needed, the BDM continues to work with the CR team to ensure complete client satisfaction.

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

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| **Process Area** | **Target** |
| Time to respond to client concerns | Within 1 business day of receiving concerns |
| Resolution time for client issues | 3 business days or less |

## **8. TOOLS USED**

* **ERP System:** For logging client concerns, tracking status updates, and storing resolution details.
* **Email (Microsoft Outlook):** For client communication and internal updates.

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

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| **Issue** | **First Contact** | **Escalation 1** | **Escalation 2** |
| Client issues unresolved after 3 days | BDM | CR Team Lead | Head of Business Development |
| Client disputes resolution | BDM | CR Team Lead | Head of Client Relations |
| Internal team delays on resolution | CR Team | Facilities/IT/Projects Team Lead | Head of BDM |

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

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| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** | **Approved By** |
| 1.0 | 2025-06-28 | Initial SOP for Post-Deal Client Follow-Up | Khushi Kausik – Operations Executives | Head of Business Development |