Sample 1

**GreenEarth Landscaping Standard Operating Procedure (SOP)**

**SOP: Client Onboarding, Landscaping Services, and Maintenance**

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* **Effective Date**: October 13, 2024
* **Prepared by**: [Your Name]
* **Approved by**: [Manager's Name]

**1. Purpose**

To outline the standardized process for onboarding clients, delivering landscaping services, and ensuring ongoing maintenance.

**2. Scope**

This SOP applies to all employees involved in sales, design, service delivery, and maintenance operations at GreenEarth Landscaping.

**3. Responsibilities**

* **Client Relations Manager (CRM)**: Manages client relationships from inquiry to contract signing.
* **Landscape Architect**: Responsible for design development and client approval.
* **Service Delivery Team**: Executes landscaping services according to approved designs.
* **Accounts Manager**: Manages billing and payments.
* **Operations Manager**: Oversees the entire project process.

**4. Procedures**

**4.1 Client Onboarding Process**

1. **Initial Inquiry**
   * Clients contact GreenEarth via phone, email, or website.
   * CRM logs the inquiry in the CRM system (Zoho CRM).
2. **Consultation**
   * Schedule a consultation within 2 business days of inquiry.
   * During consultation, gather details about the client's project, including scope, budget, and preferences.
3. **Proposal and Quotation**
   * Prepare a formal proposal based on the consultation.
   * Include scope of work, timeline, and quotation.
   * Send to the client within 3 business days of the consultation.
4. **Contract Signing**
   * Once the client approves the proposal, prepare a contract.
   * Ensure all terms are clear, including payment terms, project timeline, and deliverables.
   * Both parties sign the contract, and the project is added to the schedule.

**4.2 Landscape Design Process**

1. **Site Visit**
   * Schedule a site visit within 5 business days of contract signing.
   * Landscape Architect visits the site, takes measurements, and notes important features.
2. **Design Drafting**
   * Draft a preliminary design using SketchUp.
   * Include all relevant aspects such as plant selection, hardscaping, and irrigation.
3. **Client Review**
   * Present the draft design to the client for feedback.
   * Make adjustments as per client input within 2 business days.
4. **Final Design Approval**
   * Submit the final design to the client for approval.
   * Get client sign-off before proceeding to the next phase.

**4.3 Service Delivery Process**

1. **Project Kick-Off**
   * Schedule a kick-off meeting with the Service Delivery Team.
   * Ensure all materials, tools, and resources are ready.
2. **Execution**
   * The team executes the project, adhering strictly to the design plan.
   * Keep the client updated on progress through weekly reports.
3. **Quality Inspection**
   * Once the project is completed, the Operations Manager inspects the work.
   * Ensure all specifications are met and that the client is satisfied.
4. **Project Completion**
   * Inform the client of project completion.
   * Handle any minor adjustments or touch-ups as required.

**4.4 Payment and Invoicing Process**

1. **Invoice Generation**
   * Accounts Manager generates an invoice within 2 business days of project completion.
   * Include itemized list of services, total cost, and payment due date.
2. **Payment Collection**
   * The client pays via preferred payment method (bank transfer, online payment, or check).
   * Accounts Manager logs payment in QuickBooks.
3. **Payment Confirmation**
   * Send a confirmation email to the client once payment is received.

**4.5 Follow-Up and Maintenance Process**

1. **Client Follow-Up**
   * CRM contacts the client within 2 weeks of project completion to gather feedback.
   * Address any concerns or feedback immediately.
2. **Maintenance Scheduling**
   * If the client opts for maintenance, schedule regular maintenance visits (monthly, quarterly, etc.).
   * Document the schedule in the CRM and calendar system.
3. **Ongoing Maintenance**
   * Service Delivery Team performs maintenance according to the agreed schedule.
   * CRM checks in periodically to ensure client satisfaction with the ongoing service.

**5. Records**

All records, including contracts, designs, invoices, and client feedback, should be stored in the CRM system (Zoho CRM) and financial system (QuickBooks) for easy access and future reference.