Client Management SOPs

SOPs 001 through 007 cover the client-facing decisions that generate the highest volume of owner interruptions in landscape companies. From onboarding a new client to managing a cancellation threat, each procedure embeds Decision Rights, escalation criteria, and cadence connections so your Account Manager can operate with confidence and your owner can stay out of the weeds.

SOP #	Title	Primary Template
SOP-001	New Client Onboarding	Template 2 (Client Tiering)
SOP-002	Property Walkthrough	Template 2, Template 11 (Quality)
SOP-003	Service Scope Changes	Template 4 (Change Orders)
SOP-004	Pricing Deviations	Template 3 (Pricing)
SOP-005	Contract Renewal	Template 3 (Pricing)
SOP-006	Client Complaint Resolution	Template 9 (Complaints & Credits)
SOP-007	At-Risk Client Protocol	Template 9 (Complaints & Credits)

Calibrated for $6M-$10M landscape operations. Adjust thresholds up or down for your revenue stage.

SOP-001 | New Client Onboarding

Purpose

Every new client sets the tone for the entire relationship. Without a structured onboarding process, Account Managers improvise, details get missed, and the owner gets pulled in to fix first impressions. This SOP ensures every new client receives a consistent, professional onboarding experience with clear ownership at every step.

Primary Roles: Account Manager, Ops Manager

Related Templates: Template 2 (Client Tiering), Template 4 (Change Orders)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Client tier assignment	Account Manager	Revenue threshold, contract type, referral source, and strategic value.	Client requests Tier 1 service level but revenue does not qualify.	Owner: weekly new client summary.
Service scope and pricing	Account Manager	Approved rate card. 45% gross margin minimum. Standard contract terms.	Client requests custom pricing, scope outside rate card, or discount.	Owner: weekly sales report.
Contract terms beyond standard	Owner	Non-standard liability, payment terms, or scope commitments.	N/A - Owner-level.	A/M coordinates all client communication.

Step-by-Step Procedure

PHASE 1: PRE-START (WITHIN 48 HOURS OF SIGNED CONTRACT)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	**Account Manager**	Assign client tier based on criteria: Tier 1: Top 20% revenue or strategic Tier 2: Standard maintenance clients Tier 3: Seasonal or one-time Document in CRM with tier justification.	Client expects Tier 1 treatment but qualifies as Tier 2. Owner decides tier override.	New clients reported at Monday Standup.
2	**Account Manager**	Build client profile in CRM: contact info, property address, gate codes, irrigation details, HOA requirements, special instructions, photos of property. Attach signed contract and scope document.	Client has non-standard requirements not in contract. Flag before first service.	CRM completeness checked at Monthly Decision Review.
3	**Account Manager**	Send welcome communication to client: confirm service start date, crew day, A/M contact information, and what to expect on first visit. Phone call for Tier 1; email for Tier 2/3.	Client raises concerns or requests changes before first service.	Client communication logged in CRM.

PHASE 2: INTERNAL HANDOFF (BEFORE FIRST SERVICE)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
4	**Account Manager**	Brief Ops Manager on new client: tier, property specifics, special instructions, and any client sensitivities. O/M assigns crew and route placement.	Route capacity issue. New client requires specific crew skill set not available.	Wednesday Ops Review: new client integration.
5	**Ops Manager**	Brief assigned Crew Leader: property access, tier expectations, quality standard (9/10 for Tier 1, 8/10 for Tier 2), photo requirements. Provide property map if complex.	Crew Leader identifies scope concern after reviewing property details.	Crew Leader briefing part of daily dispatch.

PHASE 3: FIRST SERVICE AND FOLLOW-UP

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
6	**Crew Leader**	Complete first service to full quality standard. Walk property before and after. Document with photos (required for all tiers on first visit). Complete Property Service Form. Note any scope concerns.	Property conditions do not match contract scope. Access issues. Safety concerns.	End-of-day report to Ops Manager.
7	**Account Manager**	Follow up with client within 24 hours of first service. Phone call for Tier 1. "How did everything look? Anything we should adjust?" Document feedback in CRM.	Client dissatisfied with first service. Redo authority applies per SOP-006.	Friday Close-Out: new client feedback. Monday: adjustments.
8	**Account Manager**	Schedule 30-day check-in on calendar. Review: quality scores, crew feedback, client satisfaction. Confirm tier assignment is appropriate. Close onboarding in CRM.	Client has complained within first 30 days. Escalate per SOP-006 criteria.	30-day review at Monthly Decision Review agenda.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Onboarding completion (all 8 steps)	_____ %	100%	CRM checklist	Monday
First-service follow-up within 24 hours	_____ %	100% Tier 1 90% Tier 2/3	CRM activity log	Friday
30-day client satisfaction	_____ %	> 90% satisfied	A/M check-in log	Monthly
New client complaints (first 60 days)	_____ /mo	< 2 per month	KPI Dashboard	Wednesday

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By