Instructions for Notifying Existing Clients

To: [Employee Name/Department]

From: [Management/Your Name]

Date: [Date]

Subject: Standard Operating Procedure for Client Notification regarding [Project/Change/Update]

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1. Purpose

The purpose of this notification is to inform our existing clients about [briefly describe the change, e.g., price adjustment, rebranding, or account manager change].

2. Timeline

- **Draft Completion:** [Date]
- **Internal Review:** [Date]
- **Distribution Date:** [Date]

3. Distribution Channels

Please use the following methods to reach the clients:

- Primary: Email via [Email Platform Name]
- Secondary: Personalized phone calls for Tier 1 clients
- Tertiary: Notice on the Client Portal

4. Communication Template

Use the following script/template for the message:

> Subject: Important Update Regarding Your Account with [Company Name]
>
> Dear [Client Name],
>
> We are writing to inform you that [Insert specific details of the change]. Our goal is to ensure a seamless transition and continue providing you with high-quality service.
>
> **Key Changes:**

- [Change 1]
- [Change 2]

No action is required on your part at this time. If you have any questions, please contact [Contact Person] at [Phone/Email].

Best regards,
[Your Name/Title]

5. Tracking and Reporting

Once notifications are sent, please update the [Client Relationship Management (CRM)] system. Log the date sent and any immediate feedback or concerns raised by the client.

6. Support Contact

If you encounter any issues during this notification process, contact [Internal Support Name] at [Extension/Email].