

SOP Template: Follow-up Procedures with Customers Post-Resolution

This SOP details the **follow-up procedures with customers post-resolution**, emphasizing timely communication to confirm issue resolution, gather customer feedback, ensure satisfaction, provide additional assistance if needed, and document all interactions. The goal is to enhance customer relationships, improve service quality, and foster long-term loyalty by maintaining proactive and effective post-resolution engagement.

1. Purpose

To provide a standardized process for following up with customers after resolving their issues, ensuring customer satisfaction and ongoing relationship management.

2. Scope

This SOP applies to all customer service staff and representatives responsible for post-resolution engagement with customers, across all communication channels.

3. Responsibilities

- Customer Service Agents: Execute follow-up procedures and document customer feedback.
- Supervisors: Monitor compliance, review documentation, and take action on negative feedback.
- Quality Assurance Team: Analyze follow-up data to identify trends and improvements.

4. Follow-up Procedure

- 1. Timely Communication**
 - Contact the customer within **24-48 hours** after resolving the issue.
 - Preferred channels: email or phone (use customer's indicated preference).
- 2. Confirmation of Resolution**
 - Verify that the original issue has been resolved to the customer's satisfaction.
 - Example script:
"Hello [Customer Name], I'm following up to confirm that your issue regarding [brief description] has been resolved to your satisfaction. Is there anything else we can assist you with?"
- 3. Gathering Feedback**
 - Politely request customer feedback on the support experience.
 - Direct them to a survey or ask for verbal/written feedback.
- 4. Offering Additional Assistance**
 - Ensure the customer has no outstanding concerns.
 - Inform them about any available resources or additional support.
- 5. Documentation**
 - Log the follow-up interaction in the CRM or case management system, including:
 - Date & time of contact
 - Channel used
 - Summary of conversation
 - Customer feedback
- 6. Escalation (if necessary)**
 - If the customer is not satisfied or reports a recurring issue, escalate as per the escalation matrix.

5. Standard Follow-up Email Template

Step	Sample Text
Subject	Follow-up: Your recent support request
Greeting	Dear [Customer Name],

Body	<p>We wanted to check in regarding your recent support request (Case # [number]) about [brief issue description]. We trust that your issue has been resolved.</p> <p>Please let us know if everything is working as expected or if there is anything else we can assist you with.</p> <p>Your feedback is valuable to us. If you have a moment, we would appreciate you sharing your experience by clicking on the following link: [feedback/survey link].</p>
Closure	<p>Best regards, [Agent Name] [Company Name] Customer Support</p>

6. Documentation & Record-Keeping

- All customer follow-ups must be recorded in the case management system within the same business day.
- Include details of response, feedback received, and any subsequent actions.

7. Quality Assurance & Review

- Supervisors review a sample of follow-up records weekly to ensure SOP adherence.
- Recurring negative feedback or unresolved issues should be addressed in team meetings and corrective actions taken.

Note: All staff must handle customer data in accordance with company privacy policies and data protection regulations.