

# SOP Template: Initial Customer Issue Triage and Prioritization

This SOP defines the process for **initial customer issue triage and prioritization**, detailing how incoming customer problems are promptly identified, categorized, and ranked based on severity and impact. The objective is to ensure efficient allocation of resources, quick resolution of critical issues, and enhanced customer satisfaction by systematically managing reported concerns from first contact through escalation if necessary.

## 1. Purpose

To establish a standardized procedure for initial triage and prioritization of customer issues, ensuring timely, consistent, and effective response to reported problems.

## 2. Scope

This SOP applies to all customer-facing teams responsible for receiving, categorizing, and initiating resolution of customer issues (including support, technical, and account management staff).

## 3. Responsibilities

- **Customer Service Agents:** Collect and record issue details, assign initial categories, and escalate as needed.
- **Support Team Leads:** Review triaged issues and validate prioritization.
- **Escalation Team:** Handle critical/high-priority issues as escalated.

## 4. Process Steps

- Issue Intake:**
  - Receive issue via designated channels (e.g., email, ticketing system, phone).
  - Document all relevant details (customer information, time received, problem description).
- Initial Triage:**
  - Identify issue type (technical, billing, general inquiry, etc.).
  - Check available documentation or knowledge base for similar issues.
  - Assign to appropriate team if a known resolution exists.
- Issue Categorization:**
  - Classify the issue based on pre-defined categories (see Table 1 below).
  - Assign keywords/tags for easier tracking.
- Prioritization:**
  - Assess severity and business impact (refer to Table 2).
  - Set initial priority (Critical, High, Medium, Low).
- Response and Escalation:**
  - Communicate acknowledgment to the customer (including expected response timeframe).
  - If critical/high impact, escalate immediately to relevant teams.
  - Document actions and update status in the tracking system.

## 5. Categorization Table

Category	Description	Examples
Technical Issue	Problem affecting system functionality or performance.	System outage, bug reports, login failures.
Billing/Account	Issues related to payments, invoices, or account access.	Payment errors, subscription queries, account lockout.

General Inquiry	Requests for information or support not related to core operations.	How-to questions, feature requests.
Feedback	Non-urgent suggestions or comments from customers.	Product/user experience feedback.

## 6. Prioritization Matrix

Priority	Severity/Impact	Response Time	Examples
Critical	System-wide outage or security breach; multiple customers impacted	< 1 hour	Major system down, data leak
High	Key feature unavailable; significant number of users impacted	2-4 hours	Feature failure, major bug affecting workflows
Medium	Single user or group affected; workaround exists	1 business day	Account login issues, failed report generation
Low	Non-critical; minor impact; no time pressure	2-3 business days	General questions, suggestions, minor UI bugs

## 7. Escalation Procedure

- Review critical or unresolved issues every 2 hours during business hours.
- Escalate to team lead or specialist immediately if SLA is at risk.
- Keep the customer informed of progress regularly (at least daily for active issues).

## 8. Documentation and Review

- Document all actions in the ticketing or CRM system.
- Perform weekly audits of triaged issues to improve accuracy and efficiency.
- Update SOP as needed based on process reviews and performance data.

## 9. References

- Company Ticketing System Manual
- SLA (Service Level Agreement) Documentation
- Knowledge Base and Troubleshooting Guides