

SOP Template: Follow-up and Feedback Documentation Processes

This SOP details the **follow-up and feedback documentation processes**, including procedures for tracking communication, recording responses, analyzing feedback, and ensuring timely follow-ups. The goal is to maintain organized and accurate documentation that supports continuous improvement, enhances stakeholder engagement, and facilitates effective decision-making within the organization.

1. Purpose

To establish a standardized process for documenting follow-up and feedback, ensuring timely responses, clear communication, and actionable insights for organizational improvement.

2. Scope

This SOP applies to all employees and departments responsible for receiving, processing, and acting on follow-up requests and stakeholder feedback.

3. Definitions

- **Follow-up:** The process of re-engaging with stakeholders regarding prior communications or unresolved issues.
- **Feedback:** Responses and opinions provided by stakeholders, customers, or team members.
- **Documentation:** The systematic recording and storage of information for reference and analysis.

4. Responsibilities

- **Process Owners:** Ensure implementation and adherence to the SOP.
- **Employee/Team:** Document all follow-ups and feedback according to procedure.
- **Management:** Review feedback, ensure follow-ups are completed, and facilitate improvements.

5. Procedure

1. **Receive Communication/Feedback**
 - Log all incoming feedback or follow-up requirements in the designated tracking system (e.g., CRM, spreadsheet).
 - Assign a unique identifier or reference number.
2. **Record Responses**
 - Document all responses and actions taken, including date, time, and responsible employee.
 - Attach/support with relevant files or screenshots if available.
3. **Analyze Feedback**
 - Review recorded feedback weekly/monthly.
 - Categorize for trends, urgent issues, or recurring themes.
4. **Ensure Timely Follow-up**
 - Set deadlines and reminders for each follow-up action.
 - Track status (e.g., pending, in process, completed).
 - Escalate overdue items to management.
5. **Final Documentation & Reporting**
 - Archive completed cases with resolution details.
 - Generate periodic summary reports for management review.

6. Documentation Example

ID	Date	Stakeholder	Feedback/Follow-up	Status	Assigned to	Resolution/Comments
FF-2024-015	2024-06-17	Client A	Requested clarification on delivery dates.	Completed	John Smith	Provided updated schedule and confirmation email.

FF-2024-016	2024-06-18	Team Member B	Reported recurring software issue.	In Progress	IT Support	Awaiting patch deployment.
-------------	------------	---------------	------------------------------------	-------------	------------	----------------------------

7. Review & Continuous Improvement

- This SOP should be reviewed annually or after significant process changes.
- Feedback on the SOP is encouraged and should be documented for future revisions.

8. References

- Internal communication and documentation policy
- Customer Relationship Management (CRM) guidelines
- Data retention and privacy rules