

SOP Template: Handling Incoming Calls and Message Routing

This SOP describes **handling incoming calls and message routing** to ensure efficient communication within the organization. It covers procedures for answering calls promptly and professionally, verifying caller information, determining the nature of the call, and routing messages accurately to the appropriate departments or personnel. The goal is to enhance customer service, minimize call wait times, and maintain clear and organized communication channels across the company.

1. Purpose

To provide standardized procedures for efficiently managing incoming telephone calls and internal message routing, ensuring effective and timely communication throughout the organization.

2. Scope

This SOP applies to all reception staff, administrative personnel, and any team members responsible for answering phones or relaying messages within the company.

3. Responsibilities

- **Receptionist/Front Desk Staff:** Answer incoming calls and route them or their messages appropriately.
- **Administrative Staff:** Assist with message delivery and call management as needed.
- **All Employees:** Ensure prompt response to routed messages or transferred calls.

4. Procedure

1. Receiving Incoming Calls

- Answer all calls within three rings, if possible.
- Use a standard greeting: *"Good [morning/afternoon], [Company Name], this is [Your Name], how can I assist you?"*

2. Verifying Caller Information

- Request the caller's name, company (if applicable), and a contact number.
- Confirm the purpose of the call to determine the correct department or individual.

3. Determining Call Nature & Routing

- Classify the call (e.g., customer inquiry, vendor, sales, personal).
- If able to assist directly, resolve the issue; otherwise, inform the caller that you will connect them to the appropriate party.
- Use the organization's directory to identify the right department/person.
- Politely transfer the call, introducing the caller and summarizing the issue when possible.

4. Taking and Routing Messages

- If the intended recipient is unavailable, **record a detailed message** including the caller's name, contact, time/date, and reason for calling.
- Use the company's preferred method (email, internal messaging, message forms) for delivering the message promptly.
- Confirm that critical/urgent messages have been received.

5. Closing Interactions

- Thank the caller for contacting the company.
- Ensure all information is accurate and confirm any next steps.

5. Record Keeping

- Maintain a daily call log, either electronically or in a physical ledger, noting date, time, caller details, call nature, recipient, and actions taken.

6. Quality Assurance & Review

- Supervisors will regularly review call logs and message records for accuracy and adherence to procedures.
- Periodic training sessions will be scheduled for all staff on call handling and message routing best practices.

7. Contacts/References

Department/Role	Contact Number	Email/Extension
Reception Desk	XXX-XXX-XXXX	reception@[company].com
IT Support	XXX-XXX-XXXX	itsupport@[company].com
HR Department	XXX-XXX-XXXX	hr@[company].com

8. Revision History

Version	Date	Description
1.0	2024-06-07	Initial SOP Release