SOP Template: Initial Customer Contact and Information Gathering

This SOP describes the process for **initial customer contact and information gathering**, including greeting the customer, identifying their needs, collecting relevant personal and contact information, understanding the purpose of their inquiry, and setting expectations for follow-up. The goal is to ensure a positive first impression, accurate record-keeping, and effective communication to support customer service and sales efforts.

1. Purpose

To outline a standardized process for initial contact with customers and information gathering, ensuring consistent, professional, and effective communication and data collection.

2. Scope

This SOP applies to all staff responsible for handling initial customer inquiries, whether in person, over the phone, via email, or through digital platforms.

3. Responsibilities

- Customer Service Representatives (CSRs): Follow the SOP when greeting and collecting information from customers.
- Supervisors: Ensure adherence to the SOP and provide training as necessary.
- Managers: Review and update the SOP regularly.

4. Procedure

1. **Greeting the Customer**
   - Answer promptly and professionally.
   - Provide a warm and friendly introduction including your name and company.
2. **Identifying Customer Needs**
   - Politely ask open-ended questions to understand the customer's reason for initiating contact.
   - Listen attentively and take notes as appropriate.
3. **Collecting Information**
   - Gather the following details:
     - Full name
     - Contact information (phone number, email address)
     - Company name (if applicable)
     - Preferred method of contact
     - Details of inquiry or request
4. **Clarifying Purpose and Expectations**
   - Summarize the information to confirm understanding.
   - Inform the customer of the next steps and expected timeframes for follow-up.
5. **Record Keeping**
   - Document all gathered information in the appropriate system or form immediately after the interaction.
6. **Closing the Interaction**
   - Thank the customer for their inquiry.
   - Reiterate next steps and provide your contact details if appropriate.

5. Required Information - Sample Data Collection Table

Field	Description	Required?
Full Name	Customer's first and last name	Yes
Phone Number	Contact number	Yes
Email Address	Primary email contact	Yes
Company Name	Applicable if customer is representing a business	No
Preferred Contact Method	Phone, email, etc.	Yes

| Inquiry Details | Reason for contact and specific needs | Yes |
| Date & Time of Contact | When the initial contact occurred | Yes |

6. Documentation

- All information must be documented in the CRM or designated data management system.
- Ensure all entries are accurate, complete, and secure.

7. References

- Customer Service Training Manual
- Data Privacy and Security Policy

8. Revision History

Version	Date	Description	Author
1.0	2024-06-05	Initial SOP creation	[Your Name]