SOP Template: On-site Support Visit Scheduling and Execution

This SOP details the process for **on-site support visit scheduling and execution**, covering the coordination of visit dates, preparation and resource allocation, on-site activities and client interaction, problem identification and resolution, documentation of findings, and follow-up actions to ensure effective support delivery and client satisfaction.

1. Purpose

To define the standardized steps required for arranging, executing, and completing on-site support visits, ensuring efficiency, consistency, and optimal client outcomes.

2. Scope

This SOP applies to all personnel involved in field support functions, including supervisors, schedulers, and technical support staff.

3. Roles and Responsibilities

- **Support Coordinator:** Initiates scheduling, communicates with client, assigns resources.
- **Support Engineer/Technician:** Prepares for and conducts the on-site visit, addresses issues, gathers and documents findings.
- **Supervisor/Manager:** Reviews visit reports, oversees follow-up actions, ensures SOP compliance.
- **Client Contact:** Coordinates site access, provides issue details and feedback.

4. Procedure

1. **Receive Support Request:**
   - Log incoming request (ticket, email, phone call, etc.).
   - Confirm scope, urgency, and client contact details.
2. **Schedule On-site Visit:**
   - Contact client to propose visit dates and times.
   - Confirm mutually agreeable schedule.
   - Send meeting confirmation with agenda, visit details, and point-of-contact information.
3. **Preparation and Resource Allocation:**
   - Review issue history and site profile.
   - Assign qualified support personnel.
   - Prepare required documentation, tools, parts, PPE, and equipment.
4. **Conduct On-site Visit:**
   - Check in with client contact upon arrival.
   - Follow safety and security protocols.
   - Engage with client to clarify issues and expected outcomes.
5. **Problem Identification and Resolution:**
   - Investigate and diagnose reported issues.
   - Implement solutions or workarounds as appropriate.
   - Test and verify resolution with client involvement.
6. **Documentation of Findings:**
   - Complete on-site visit report, including actions taken, parts used, unresolved issues, and client feedback.
   - Obtain client sign-off or acknowledgment where required.
7. **Follow-up Actions:**
   - Communicate visit summary and next steps (if any) to client.
   - Escalate unresolved items or order additional parts as needed.
   - Close related tickets upon completion.

5. Documentation and Records

- Support visit log/ticket
- On-site visit report (template attached if applicable)
- Client communications and acknowledgments

6. Quality Control

- Periodic review of completed support visits for compliance and improvement opportunities.
- Client satisfaction surveys after completion of site visits.

7. References

- Company Health and Safety Manual
- On-site Visit Report Template
- Client Communication Guidelines