SOP Template: On-site Support Visit Guidelines

This SOP provides clear **on-site support visit guidelines** to ensure effective and consistent field service delivery. It outlines the preparation steps before the visit, including understanding client needs and required tools, the conduct during the visit emphasizing professionalism and safety, and post-visit reporting and follow-up procedures. The goal is to enhance customer satisfaction, maintain equipment performance, and support timely resolution of issues through standardized on-site service practices.

1. Objective

To establish standardized guidelines for on-site support visits that ensure efficiency, professionalism, and customer satisfaction.

2. Scope

This SOP applies to all field service personnel performing on-site support visits at customer locations.

3. Responsibilities

- Field Service Technicians: Follow all guidelines and protocols described in this SOP.
- Supervisors/Managers: Ensure technicians are trained and SOP is adhered to.
- Support Staff: Assist in scheduling, logistics, and documentation support.

4. Procedure

4.1. Pre-Visit Preparation

1. Review the service request and customer history.
2. Contact customer to confirm appointment details, scope, and access requirements.
3. Prepare necessary tools, equipment, and documentation.
4. Ensure all safety gear and personal protective equipment (PPE) are available.
5. Identify any known site-specific hazards.

4.2. Conduct During Visit

1. Arrive on time and present professional identification.
2. Briefly introduce yourself and explain the purpose of the visit.
3. Follow all site-specific safety protocols.
4. Communicate clearly with the client regarding work to be performed.
5. Perform required tasks efficiently and professionally.
6. Document work completed, issues found, and actions taken.

4.3. Post-Visit Procedures

1. Review work with customer and address any immediate questions.
2. Clean up the work site and remove tools/materials.
3. Complete and submit visit report, including recommendations for follow-up.
4. Document any unresolved issues or future service requirements.
5. Thank the customer and confirm satisfaction before departing.

5. Safety and Professionalism

- Adhere to company dress code and safety standards at all times.
- Use PPE and follow site safety protocols.
- Report any accidents or incidents as per company policy.
- Respect client property and maintain confidentiality.

6. Documentation

- On-site Visit Report
- Customer Acknowledgment Form

- Checklist of tools and materials
- Safety Checklist

7. Revision and Review

This SOP shall be reviewed annually or as required based on changes in processes, safety standards, or regulations.