Standard Operating Procedure (SOP)

Phone Call Etiquette and Documentation Procedures

This SOP defines **phone call etiquette and documentation procedures**, covering proper communication protocols, appropriate greetings and tone, active listening skills, handling difficult callers, call transfer and hold procedures, accurate call content recording, confidentiality and data protection, follow-up actions and reporting, and maintaining call logs. The aim is to ensure professional, courteous, and efficient telephone interactions while maintaining thorough and accurate documentation for accountability and quality assurance.

1. Purpose

To establish standardized procedures for answering, handling, and documenting phone calls, ensuring professionalism, efficiency, and data security throughout all telephone communications.

2. Scope

This SOP applies to all employees who interact with external or internal parties via telephone as part of their job responsibilities.

3. Procedures

1. **Answering Calls**
   - Answer calls promptly, ideally within three rings.
   - Greet the caller professionally: state your department and name (e.g., "Good morning, [Department], this is [Name]. How may I assist you?").
   - Use a polite, friendly, and clear tone.

2. **Active Listening**
   - Listen attentively without interrupting.
   - Confirm and clarify details as necessary (e.g., "Let me confirm that I understood your request...").

3. **Handling Difficult Callers**
   - Remain calm, patient, and professional at all times.
   - Acknowledge the caller's concerns and offer solutions or escalate as appropriate.

4. **On Hold and Call Transfers**
   - Ask permission before placing a caller on hold; provide an estimated wait time.
   - When transferring a call, inform the caller of the reason and to whom they are being transferred.
   - Announce the caller to the receiving party before completing the transfer.

5. **Documentation**
   - Record key details of the call (date, time, caller's name, reason for the call, actions taken, and any follow-up required).
   - Use standardized call log templates or the designated communication system.
   - Document immediately after the call to ensure accuracy.

6. **Confidentiality and Data Protection**
   - **Never disclose confidential information over the phone unless identity verification is completed per company policy.**
   - Securely store all documentation and limit access to authorized personnel only.

7. **Follow-Up and Reporting**
   - Complete any required follow-up actions promptly.
   - Report unresolved issues or incidents to supervisors as needed.

8. **Maintaining Call Logs**
   - Update call logs daily, ensuring all entries are accurate and complete.
   - Regularly review logs to monitor patterns or issues.

4. Quality Assurance

- Supervisors will periodically review call logs and documentation for compliance.

- Training and feedback will be provided to maintain high standards.

5. Revision History

Date	Version	Description	Author
2024-06-XX	1.0	Initial SOP issue	Admin