

# SOP Template: Order Taking and Customer Service Protocols

This SOP details the **order taking and customer service protocols**, encompassing procedures for accurate order processing, effective communication with customers, handling inquiries and complaints, payment processing, order confirmation and follow-up, as well as maintaining customer satisfaction through timely and professional service. The aim is to ensure a seamless customer experience, reduce errors, and foster positive relationships between the business and its clients.

## 1. Scope

This SOP applies to all employees engaged in order taking and customer service activities, both in-person and remotely (phone, online, email, etc.).

## 2. Responsibilities

- **Customer Service Representatives:** Accurate order entry, effective communication, issue resolution, and customer follow-up.
- **Supervisors/Managers:** Oversight, escalation handling, and process improvement.
- **Accounts/Finance Team:** Payment processing and reconciliation.

## 3. Procedures

### 3.1 Order Taking

1. Greet the customer promptly and professionally.
2. Determine and confirm customer requirements (products/services, quantity, delivery method, etc.).
3. Input order details accurately into the order management system.
4. Repeat order summary to customer for verification before submission.

### 3.2 Communication Protocols

- Use clear, courteous, and professional language at all times.
- Listen actively, acknowledge customer concerns, and clarify details as needed.
- Maintain confidentiality of customer information.

### 3.3 Inquiry Handling

1. Respond to inquiries promptly (within 1 business hour if possible).
2. Provide accurate product/service information.
3. Document interactions in the customer management system.

### 3.4 Complaint Handling

1. Listen empathetically to the customer's complaint.
2. Apologize, if necessary, and reassure the customer their issue will be addressed.
3. Log the complaint and escalate as per escalation matrix (see below).
4. Follow up with the customer on resolution status.

### 3.5 Payment Processing

1. Confirm order and provide payment options to the customer.
2. Process payments securely according to company guidelines.
3. Issue payment confirmation/receipt to customer.

### 3.6 Order Confirmation and Follow-up

1. Send order confirmation to customer via preferred communication channel.
2. Update customer on expected delivery or service timeline.
3. Follow up post-delivery/service to ensure customer satisfaction.

### 3.7 Customer Satisfaction

- Solicit feedback after order completion.
- Act on feedback for service improvement.

## 4. Escalation Matrix

Issue Type	First Contact	Next Level	Escalation Timeline
Order Error/Correction	Customer Service Rep	Supervisor/Manager	Within 2 hours
Payment Issues	Customer Service Rep	Accounts Team	Same business day
Unresolved Complaints	Customer Service Rep	Manager	Within 24 hours

## 5. Documentation & Records

- All orders, interactions, and complaints must be logged in the CRM/order management system.
- Retain records according to the company's data retention policy.

## 6. Review & Continuous Improvement

- Customer service performance shall be reviewed monthly by supervisors.
- Implement improvements based on customer feedback and error analysis.

## 7. References

- Company Privacy Policy
- Payment Processing Procedures
- Customer Complaint Handling Policy