SOP Template: Call Closing and Follow-Up Procedures

This SOP details the **call closing and follow-up procedures**, encompassing effective techniques for concluding customer interactions, ensuring clarity and satisfaction, documenting call outcomes accurately, scheduling timely follow-ups, and maintaining consistent communication to enhance customer experience and support ongoing relationship management.

1. Purpose

To provide clear guidelines for closing customer calls and managing follow-up tasks, ensuring high customer satisfaction and accurate record-keeping.

2. Scope

This SOP applies to all team members responsible for handling customer calls and managing subsequent follow-up actions.

3. Procedure

1. **Call Closing Techniques**
    - Summarize the discussion and confirm key points with the customer.
    - Verify all questions or concerns have been addressed.
    - Clearly outline next steps, if any.
    - Politely thank the customer for their time and engagement.
    - Offer contact information for further assistance.
2. **Ensuring Clarity and Satisfaction**
    - Ask the customer if they need additional support before ending the call.
    - Confirm their satisfaction with the provided information or resolution.
3. **Documenting Call Outcomes**
    - Record the call summary in the designated CRM or call log system immediately after the call.
    - Note any agreed-upon actions or follow-up requirements.
    - Update the customer's profile as necessary.
4. **Scheduling and Managing Follow-Up**
    - Determine appropriate follow-up actions and timelines.
    - Schedule follow-up tasks or appointments in the calendar system and set reminders.
    - Assign responsibility for follow-up to the relevant team member.
5. **Consistent Communication**
    - Send follow-up emails, messages, or calls as scheduled.
    - Maintain professionalism in all communications.
    - Document all follow-up interactions and customer responses.

4. Responsibilities

- Customer Service Representatives: Follow this SOP for each call, document accurately, and execute follow-ups as scheduled.
- Supervisors: Monitor compliance and provide coaching or feedback as needed.

5. References

- Company Customer Communication Guidelines
- CRM Documentation Manual

6. Revision History

Version	Date	Description	Author
1.0	2024-06-12	Initial SOP release	Customer Experience Team