

SOP Template: Handling Customer Preferences and Special Requests

This SOP details the process for **handling customer preferences and special requests**, including identifying and documenting customer needs, customizing products or services, effective communication with customers, managing expectations, coordinating with relevant departments, ensuring timely fulfillment, and maintaining customer satisfaction. The objective is to provide personalized service that enhances customer experience and loyalty while ensuring accuracy and efficiency in meeting special requirements.

1. Purpose

To provide clear and consistent instructions for handling customer preferences and special requests to ensure personalized service and high satisfaction.

2. Scope

This procedure applies to all staff members involved in customer service, order processing, product/service customization, and fulfillment.

3. Responsibilities

- **Customer Service Team:** Identify, document, and communicate customer preferences and special requests.
- **Fulfillment/Operations:** Customize products/services accordingly and ensure timely delivery.
- **Management:** Oversee process adherence and address escalated concerns.

4. Procedure

Step	Description	Responsible Party
1. Identification	Listen actively and ask clarifying questions to understand customer preferences and special requests.	Customer Service
2. Documentation	Record preferences/special requests in the CRM or designated system with all relevant details and deadlines.	Customer Service
3. Confirmation	Confirm recorded preferences/requests with the customer for accuracy. Communicate expected timelines and limitations.	Customer Service
4. Coordination	Communicate requirements to the relevant departments (production, kitchen, operations, etc.).	Customer Service, Relevant Dept.
5. Fulfillment	Customize and process the order or service as per documented requirements, adhering to specified timelines.	Fulfillment/Relevant Dept.
6. Follow-Up	Inform the customer of the status. Address any issues promptly and escalate if necessary.	Customer Service
7. Completion & Feedback	Confirm fulfillment with the customer, solicit feedback, and record any additional preferences for future reference.	Customer Service

5. Communication Guidelines

- Maintain professionalism and empathy at all times.
- Set realistic expectations regarding what can and cannot be accommodated.
- Provide timely updates on request status, especially if delays or changes occur.

6. Records and Documentation

- Ensure all preferences and special requests are recorded in the customer's profile.

- Keep documentation updated and accessible for future reference.

7. Continuous Improvement

- Review feedback regularly to identify patterns and improvement opportunities.
- Adjust products, services, or processes to better meet customer needs.

8. Related Documents

- Customer Service Manual
- CRM Usage Guidelines
- Product/Service Customization Policy

9. Revision History

Date	Version	Description	Author
2024-06-12	1.0	Initial SOP template created	AI Assistant