

SOP: Transferring Calls Accurately to the Appropriate Person or Department

This SOP details the process for **transferring calls accurately** to the appropriate person or department, ensuring seamless communication and efficiency in handling customer inquiries. It covers identifying caller needs, verifying the correct department or individual, using proper call transfer techniques, providing clear information during the transfer, and following up to confirm successful handoff. The goal is to enhance customer satisfaction and internal coordination by minimizing call misdirection and delays.

1. Purpose

To ensure all phone calls are transferred accurately and efficiently to the relevant person or department, improving communication and customer service.

2. Scope

This procedure applies to all staff involved in answering and transferring external and internal telephone calls.

3. Responsibilities

- All staff must follow this procedure when transferring calls.
- Supervisors are responsible for ensuring staff are trained on this SOP.

4. Procedure

- 1. Answer the Call Professionally**
Greet the caller, state your name and department, and ask how you can assist.
- 2. Identify Caller Needs**
Listen actively to determine the purpose of the call and information required.
- 3. Verify the Right Department/Person**
Use the company directory or consult with team members if unsure.
- 4. Inform the Caller**
Politely explain that you will transfer them and to whom/which department.
- 5. Perform the Call Transfer**
 - Use the appropriate phone function (e.g., "Transfer" or "Hold").
 - Announce the call to the receiving party when possible, providing caller's name and reason for the call.
 - If unavailable, inform the caller and offer alternatives (voicemail, call back, etc.).
- 6. Complete the Transfer**
Ensure the call connects successfully and the receiving party is aware of the context.
- 7. Confirm Handoff**
When feasible, follow up with the recipient/department to confirm the caller's needs are being addressed.

5. Tips for Effective Call Transfers

- Always remain polite and professional.
- Do not leave callers on hold for too long without updates.
- Transfer only when necessary; answer queries yourself if able.
- Document any relevant information for follow-up, if needed.

6. Exceptions

In urgent or emergency situations, follow the company's escalation protocol instead of standard transfer procedures.

7. Revision History

Version	Date	Description of Change	Author

1.0	2024-06-12	Initial version	[Your Name]
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Note: Regularly review and update this SOP to reflect changes in phone systems or organizational structure.