Standard Operating Procedure (SOP)

Customer Inquiry Handling Protocol

This SOP details the **customer inquiry handling protocol**, covering procedures for receiving, categorizing, and responding to customer questions and concerns, ensuring timely and accurate communication. It emphasizes the importance of professionalism, effective listening, information verification, and proper documentation. The goal is to enhance customer satisfaction, streamline inquiry resolution, and maintain positive client relationships through consistent and efficient handling of all inquiries.

1. Purpose

To define the process for receiving, categorizing, documenting, and resolving customer inquiries in a consistent, timely, and customer-focused manner.

2. Scope

This protocol applies to all employees responsible for customer communications, including phone, email, chat, and in-person inquiries.

3. Responsibilities

- **Customer Service Representatives**: Receive, document, and resolve inquiries according to this SOP.
- **Supervisors/Managers**: Oversee adherence to the protocol and assist with escalated or complex inquiries.
- **All Staff**: Maintain professionalism and uphold company standards in all communications.

4. Procedure

1. **Inquiry Reception**
   - Greet customer courteously and identify yourself and the company.
   - Listen actively to the customer's inquiry; do not interrupt.
   - Clarify and repeat key points to confirm understanding.
2. **Categorization**
   - Determine the type of inquiry (e.g., product, billing, technical).
   - Assign appropriate priority (urgent, standard, low).
   - Log inquiry in the system with time, date, and category.
3. **Information Verification**
   - Request relevant customer information for verification.
   - Validate customer identity and details as per company policy.
4. **Response and Resolution**
   - Provide or seek accurate and complete information/solutions.
   - If resolution is immediate, communicate clearly and confirm customer satisfaction.
   - If follow-up is required, provide estimated response time and contact details.
   - Escalate complex or unresolved issues as per escalation matrix.
5. **Documentation**
   - Record all interactions and actions taken in the CRM or designated system.
   - Include resolution details, responsible employee, and customer feedback.
6. **Follow-Up**
   - Contact customer post-resolution to confirm issue closure and satisfaction.
   - Document follow-up outcome.

5. Communication Standards

- Use clear, concise, and professional language at all times.
- Avoid jargon unless customer is familiar with technical terms.
- Remain courteous, patient, and empathetic throughout the interaction.

6. Escalation Matrix (Sample)

Issue Type	Escalation Point	Timeframe
Urgent/Unresolved	Team Leader/Supervisor	Immediately

Technical/Complex	Subject Matter Expert	Within 24 hours
Complaint	Quality Manager	Within 12 hours

7. Records and Documentation

- All inquiry records must be maintained for a minimum of 12 months or as per company policy.
- Confidentiality of customer information must be ensured at all times.

8. Review and Training

- This SOP should be reviewed annually or upon significant process changes.
- All relevant personnel must receive training on this protocol upon hiring and with each update.