Standard Operating Procedure (SOP)

Client Communication and Service Request Handling

This SOP details effective **client communication and service request handling**, covering procedures for receiving, documenting, and responding to client inquiries and service requests promptly. It emphasizes clear, professional communication, tracking and prioritizing requests, coordinating with relevant departments, and ensuring timely resolution and follow-up. The aim is to enhance client satisfaction, maintain transparency, and streamline service delivery through consistent and efficient communication practices.

1. Purpose

To outline standardized procedures for managing client communications and handling service requests to ensure high levels of client satisfaction and operational efficiency.

2. Scope

This SOP applies to all employees involved in client interaction, including but not limited to customer service representatives, account managers, and technical support teams.

3. Roles and Responsibilities

Role	Responsibilities
Client Service Representative	Receive, document, and acknowledge client inquiries; provide information or escalate as necessary.
Account Manager	Oversee complex requests, ensure high value clients receive appropriate attention, and coordinate with other departments.
Technical/Support Teams	Address and resolve escalated service requests within agreed timelines.
SOP Supervisor	Monitor adherence, provide training, and update SOP as needed.

4. Procedure

1. **Receiving Requests**
   - Accept inquiries or service requests via approved channels (phone, email, portal, etc.).
   - Greet clients professionally and confirm understanding of their request.
2. **Documenting Requests**
   - Log details into the Customer Relationship Management (CRM) system or relevant ticketing platform immediately upon receipt.
   - Include client contact information, nature of the request, date/time, and any associated priority level.
3. **Acknowledging and Responding**
   - Send a confirmation to the client acknowledging receipt of the request within 1 business hour.
   - Provide an estimated time to resolution or next update, if possible.
4. **Prioritizing and Categorizing**
   - Assign priority based on urgency and impact.
   - Route the request to the appropriate department or personnel for action.
5. **Handling and Resolution**
   - Address requests following internal workflows and service level agreements (SLAs).

    - Maintain clear, timely communication with the client throughout the process.

6. **Follow-Up and Closure**
    - Verify with the client that the issue/request has been resolved to their satisfaction.
    - Document the resolution and formally close the request in the system.
    - Solicit feedback where appropriate.

5. Communication Standards

- Maintain professional, courteous, and empathetic tone at all times.
- Use clear and concise language, avoiding jargon unless appropriate for the client.
- Provide regular updates to clients on request status, especially in case of delays.
- Record all client interactions in the CRM or designated platform.

6. Performance Metrics

- Response time to client inquiries/request acknowledgment
- Average resolution time for service requests
- Client satisfaction scores
- Rate of repeat/reopened requests

7. Review and Continuous Improvement

- Review this SOP annually or as changes in business processes occur.
- Collect and analyze feedback from both clients and team members to enhance service quality.