

SOP: Ongoing Support Contact and Follow-up Schedule Establishment

This SOP defines the process for **ongoing support contact and follow-up schedule establishment**, ensuring consistent communication with clients or stakeholders. It includes setting regular follow-up intervals, documenting contact methods, and tracking progress to maintain strong relationships, address concerns promptly, and guarantee customer satisfaction through systematic support activities.

1. Purpose

To provide a standardized procedure for establishing and maintaining ongoing support contact and follow-up schedules for clients/stakeholders.

2. Scope

This SOP applies to all customer support, account management, and stakeholder engagement activities requiring regular follow-up and communication.

3. Responsibilities

- **Support Staff:** Initiate and maintain scheduled follow-up contacts; document all interactions.
- **Account Managers:** Oversee support schedules, adjust intervals as necessary, and ensure completion of planned activities.
- **Supervisors:** Monitor adherence to the SOP and review reports.

4. Procedure

- Initial Support Contact**
 - Establish primary point of contact with the client/stakeholder after onboarding.
 - Communicate available contact methods (phone, email, chat, etc.).
 - Log first contact in the Customer Relationship Management (CRM) system.
- Set Follow-up Schedule**
 - Discuss and agree on suitable follow-up intervals (e.g., weekly, monthly, quarterly) with the client/stakeholder.
 - Document agreed intervals and preferred contact methods.
 - Enter schedule into the CRM or tracking tool.
- Ongoing Support and Follow-up**
 - Contact the client/stakeholder as per the established schedule.
 - Provide assistance, updates, or feedback as necessary.
 - Address and resolve any concerns or issues raised.
 - Document all interactions and outcomes in the CRM.
- Review and Adjust Schedule**
 - Periodically review the effectiveness of the follow-up schedule.
 - Modify intervals or contact methods as required upon mutual agreement.
 - Update all records accordingly.
- Escalation Protocol**
 - Escalate unresolved issues to higher management as per the escalation matrix.
 - Document escalation actions and resolutions.

5. Documentation and Tracking

Document	Responsible	Location
Contact Log	Support Staff	CRM/Support Platform
Follow-up Schedule	Account Manager	CRM/Support Platform
Issue/Resolution Records	Support Staff	CRM/Support Platform

6. Review

- This SOP should be reviewed annually or as needed to ensure continued effectiveness.
- All staff should be trained on updates as changes occur.

7. References

- Customer Communication Policy
- CRM User Manual