

SOP Template: Special Instructions and Customization Handling

Purpose

This SOP details the process for managing **special instructions and customization handling**, including receiving and documenting specific customer requirements, communicating custom requests across departments, ensuring accurate implementation during production or service delivery, quality control checks tailored to modifications, and maintaining clear records for traceability. The goal is to provide precise and efficient customization services that meet client expectations while upholding operational consistency and quality standards.

Scope

This SOP applies to all staff involved in order handling, production, service delivery, and quality assurance where customer-specific instructions or customization requests are involved.

Responsibility

- **Sales/Customer Service:** Receives and documents customer requirements.
- **Production/Service Teams:** Implements customizations as specified.
- **Quality Assurance:** Verifies custom work meets requirements.
- **All Staff:** Maintains accurate records related to customizations.

Procedure

1. **Receiving Special Instructions and Customization Requests**
 - Sales/Customer Service receives request from client via approved channels (e.g., email, online form, portal).
 - Clarify and confirm requirements with customer as needed.
2. **Documenting Requests**
 - Record all custom instructions in the designated system or order form.
 - Attach supporting documents or reference materials when provided by client.
3. **Internal Communication**
 - Forward detailed instructions to relevant departments (Production, Service Delivery, etc.).
 - Hold a hand-off or kick-off meeting for complex customizations as required.
4. **Implementation**
 - Production or Service teams execute the customizations as per documented instructions.
 - Keep open channels for clarification during execution phase.
5. **Quality Control**
 - Tailor quality control checks to ensure custom requirements are met.
 - Document inspection results and sign-off by QA before delivery or completion.
6. **Record Keeping and Traceability**
 - Maintain detailed records of all custom orders, instructions, communications, and QA checks in the system.
 - Archive completed customization requests for traceability and future reference.
7. **Client Communication and Feedback**
 - Notify client upon completion of customized request.
 - Solicit feedback to ensure satisfaction and improve future processes.

Documentation

Recommended forms and templates:

Document Name	Purpose
Customization Request Form	Capture detailed customer instructions
Customization Implementation Checklist	Guide production/service teams during execution
Custom QA Checklist	Quality control for custom modifications
Record Log	Track all custom projects for traceability

Quality Assurance

All customized orders must undergo additional checks specific to the modifications as outlined by QA. Any deviations or issues must be documented and communicated immediately.

Review and Continuous Improvement

Regularly review feedback from clients and internal staff to update this SOP and associated forms as needed to enhance clarity, efficiency, and customer satisfaction.

Note: Failure to adhere to this SOP may result in substandard service or product delivery and must be reported to management for corrective action.