

Standard Operating Procedure (SOP): Customer Follow-up and Satisfaction Confirmation

This SOP details the **customer follow-up and satisfaction confirmation process**, encompassing timely communication with customers post-purchase, gathering feedback on product or service satisfaction, addressing any issues or concerns raised, and ensuring continuous improvement based on customer input. The goal is to enhance customer experience, foster loyalty, and maintain high standards of service quality through consistent and effective follow-up procedures.

1. Purpose

To establish a standardized approach for post-purchase follow-up to confirm customer satisfaction, promptly resolve issues, and gather actionable feedback for organizational improvement.

2. Scope

This procedure applies to all customers who have completed a purchase of products or services with the company.

3. Responsibilities

- **Customer Service Representatives:** Execute follow-up communication, document feedback, and escalate concerns as needed.
- **Customer Experience Manager:** Oversee process, review feedback reports, implement improvements, and ensure SOP adherence.
- **Quality Assurance Team:** Monitor quality metrics and assist in improvement actions.

4. Procedure

1. **Initiate Follow-up**
 - Contact customer within **2-5 business days** post-purchase via preferred method (phone, email, or SMS).
 - Use the standardized follow-up script or template (see Appendix A).
2. **Gather Feedback**
 - Ask about satisfaction with the product/service and overall customer experience.
 - Document responses in the CRM system.
3. **Address Issues or Concerns**
 - Listen actively to any problems or dissatisfaction.
 - Initiate issue resolution procedures or escalate to relevant departments as per escalation matrix.
4. **Confirm Satisfaction**
 - Verify that the customer is satisfied with the resolution (if applicable).
 - Thank the customer for their feedback and engagement.
5. **Feedback Analysis & Continuous Improvement**
 - Regularly review collected feedback and trends (weekly/monthly).
 - Report insights to management and propose improvement actions.
 - Update SOP and training materials as needed.

5. Documentation and Records

- All communications and feedback recorded in the CRM.
- Issue resolution logs maintained for tracking and auditing purposes.
- Monthly satisfaction and feedback reports shared with management team.

6. Monitoring and Review

- Monitor key metrics: follow-up completion rate, satisfaction scores, resolution times.
- Review SOP annually or as required for process optimization.

7. Appendix A: Sample Follow-up Script

Step	Script
Greeting	â€œHello, [Customer Name]. This is [Your Name] from [Company Name]. I hope you are doing well.â€
Purpose	â€œI'm reaching out to ensure that you are satisfied with your recent purchase of [Product/Service].â€
Feedback Request	â€œCould you please share your experience or let us know if you have any concerns or questions?â€
Closure	â€œThank you for your valuable feedback. We appreciate your business and are here if you need further assistance.â€