SOP Template: Follow-up Procedures with the Customer

This SOP details the **follow-up procedures with the customer**, emphasizing timely communication, customer satisfaction evaluation, issue resolution tracking, feedback collection, and maintaining a positive customer relationship. The goal is to ensure ongoing customer engagement, address any concerns promptly, and enhance overall service quality through consistent and effective follow-up practices.

1. Purpose

To establish a standardized process for conducting customer follow-ups that ensures satisfaction, timely issue resolution, and continuous improvement in service quality.

2. Scope

This SOP applies to all employees responsible for interacting with customers following a sale, service delivery, or issue resolution.

3. Responsibilities

- Customer Service Representatives: Execute follow-up communications and log customer responses.
- Team Leaders/Supervisors: Monitor and review follow-up activities for compliance.
- Quality Assurance: Analyze feedback and issue resolution data to recommend improvements.

4. Procedures

1. **Initial Follow-Up Contact**
    - Contact the customer within **[specified timeframe]** after the initial transaction or service.
    - Thank the customer and confirm they have received their product/service as expected.
2. **Customer Satisfaction Evaluation**
    - Ask targeted questions to assess the customer's satisfaction.
    - Document customer responses and escalate any dissatisfaction per escalation protocols.
3. **Issue Resolution Tracking**
    - If issues are reported, log details in the CRM or designated system.
    - Assign issues to the relevant team/department and provide the customer with an expected resolution timeframe.
    - Follow up regularly until resolution is confirmed by the customer.
4. **Feedback Collection**
    - Invite the customer to provide feedback via survey, email, or phone.
    - Record feedback for continuous improvement purposes.
5. **Maintaining Customer Relationship**
    - Offer additional support or information as needed.
    - Thank the customer for their time, feedback, and ongoing business.
    - Provide updates on actions taken based on their feedback if applicable.

5. Documentation

- All communications and outcomes must be documented in the CRM or designated tracking system.
- Records should include date, method of contact, summary of conversation, and any follow-up actions taken.

6. Monitoring and Review

- Supervisors will conduct regular audits of follow-up activities for adherence to this SOP.
- Customer feedback and follow-up effectiveness will be reviewed monthly to identify trends and areas for improvement.

7. References

- Customer Service Policy Manual
- Escalation Procedures Document

- CRM Documentation Guidelines

8. Revision History

Version	Date	Description of Changes	Approved By
1.0	[Date]	Initial SOP Release	[Name/Title]