

SOP Template: Call Handling Procedures and Script Usage

This SOP details the **call handling procedures and script usage** to ensure consistent, professional, and effective communication with customers. It covers the steps for answering calls promptly, verifying caller information, following a standardized script for various call types, managing difficult situations, and properly documenting call outcomes. The goal is to enhance customer satisfaction, maintain communication quality, and streamline call center operations.

1. Purpose

To provide standardized processes for call handling and script utilization, thereby ensuring clear, professional interactions and efficient resolution of customer needs.

2. Scope

This procedure applies to all call center agents and support staff responsible for direct customer communication by telephone.

3. Responsibilities

- Adhere strictly to the procedures and scripts outlined in this SOP.
- Provide accurate and courteous information to all callers.
- Document all call outcomes per organizational standards.

4. Call Handling Procedures

1. Answering Calls Promptly

- Answer incoming calls within three rings.
- Greet the caller using the standardized script.

2. Verifying Caller Information

- Request and confirm the caller's name and any required identification (e.g., account number).
- Validate information as per company requirements before proceeding.

3. Following Standardized Scripts

- Utilize the prescribed script for the specific call type (inquiry, complaint, technical support, etc.).
- Adapt wording for natural flow while retaining key information and compliance points.

4. Managing Difficult Situations

- Remain calm and empathetic in the case of upset or irate callers.
- Follow the escalation protocol if unable to resolve the issue within defined authority.

5. Documenting Call Outcomes

- Accurately record the details and outcome of each call in the CRM or designated database immediately after the call.

5. Script Usage

Use scripts as a guideline for effective communication. Key elements include:

- Consistent greeting and introduction
- Polite verification of customer information
- Clear responses to inquiries

- Reassuring closure and confirmation of next steps

Example Standard Greeting Script:

“Good [morning/afternoon/evening], thank you for calling [Company Name]. My name is [Your Name]. How may I assist you today?”

Example Closing Script:

“Is there anything else I can help you with today? Thank you for calling [Company Name]. Have a great day!”

6. Escalation Procedure

1. If the caller's issue cannot be resolved within your level of authority or expertise, inform the caller courteously.
2. Follow the internal escalation protocol to transfer the call or arrange a follow-up.
3. Document the reason for escalation and actions taken.

7. Quality Assurance

- Supervisors will review call recordings and documentation regularly for compliance with this SOP.
- Feedback and retraining will be provided as necessary.

8. Revision History

Version	Date	Description of Changes	Author
1.0	2024-06-01	Initial creation	Operations Manager