

# SOP Template: Pickup Hand-Off Procedures and Customer Identification

This SOP details **pickup hand-off procedures and customer identification** to ensure secure and efficient transfer of goods. It includes verification of customer identity through valid documentation, confirmation of order details before hand-off, clear communication protocols between staff and customers, and documentation of the transaction to prevent errors or fraud. The aim is to maintain a smooth and accountable pickup process that protects both the business and the customer.

## 1. Purpose

To outline standardized procedures for secure and accurate hand-off of goods to customers, ensuring positive customer experience and reducing risk of errors or unauthorized pickups.

## 2. Scope

This SOP applies to all staff members involved in customer pickups at *[Business Name/Location]*.

## 3. Responsibilities

- **Staff:** Follow verification and documentation protocols.
- **Supervisor/Manager:** Ensure SOP is understood and implemented. Resolve any escalations.

## 4. Procedure

- Customer Arrival:**
  - Greet customer promptly and politely.
  - Ask for the order confirmation number and customer name.
- Identity Verification:**
  - Request valid photo identification (e.g., driver's license, passport).
  - Compare the name on the ID with the order information.
- Order Confirmation:**
  - Verify order details (items, quantity, special instructions) with the customer.
- Hand-Off:**
  - Hand over the goods only after successful verification.
  - If third-party pickup, verify authorization documentation or code and record representative's ID information.
- Documentation:**
  - Record the pickup in the tracking system/log book.
  - Have the customer or authorized person sign the pickup receipt.
- Communication:**
  - Offer customer a summary of items picked up and obtain acknowledgment.
  - Provide a copy of the signed receipt if requested.
- Issue Resolution:**
  - If discrepancies or issues arise, escalate to a supervisor immediately.

## 5. Acceptable Identification Documents

Document Type	Accepted?
Driver's License	Yes
Passport	Yes
State ID Card	Yes

Company ID (for B2B)	Yes
Student ID	Case-by-case
Other	With Supervisor Approval

## 6. Documentation and Record-Keeping

- Complete all fields in the pickup log including date, time, order ID, customer name, type of ID provided, and staff initials.
- Store records securely for audit and reference purposes following company data privacy policies.

## 7. Training

- All staff must be trained on this SOP before performing customer pickups.
- Periodic refresher training is recommended.

## 8. Revision History

Version	Date	Description	Author
1.0	2024-06-01	Initial Release	[Your Name]

*End of SOP*