SOP: Customer Inquiry Handling Procedures

This SOP details the **customer inquiry handling procedures**, covering prompt response protocols, effective communication techniques, accurate information provision, tracking and documentation of inquiries, escalation processes for complex issues, and follow-up actions to ensure customer satisfaction. The aim is to enhance customer experience, improve service efficiency, and maintain consistent and professional interactions with all customer inquiries.

1. Purpose

To establish standard procedures for efficiently and professionally handling customer inquiries.

2. Scope

This SOP applies to all customer service representatives (CSRs) handling inquiries through all communication channels (phone, email, chat, social media, etc.).

3. Responsibilities

- **Customer Service Representatives:** Follow procedures for inquiry handling, documentation, and escalation.
- **Supervisors/Managers:** Provide guidance, oversee escalations, and ensure adherence.
- **Quality Assurance Team:** Monitor compliance and recommend improvements.

4. Procedure

1. **Prompt Response Protocols**
    - Acknowledge all customer inquiries within **1 business hour** during standard support times.
    - For inquiries received outside business hours, confirm receipt within the first hour of the next working day.
2. **Effective Communication Techniques**
    - Greet the customer courteously and introduce yourself.
    - Use clear, concise, and positive language.
    - Listen actively and empathetically to understand the customer's concerns.
    - Use the customer's name where appropriate and maintain a professional tone.
3. **Accurate Information Provision**
    - Verify customer information to ensure security and privacy.
    - Provide accurate, up-to-date, and relevant information in response to the inquiry.
    - If unsure, commit to finding the information and following up promptly.
4. **Tracking and Documentation**
    - Log all inquiries in the Customer Relationship Management (CRM) system with details: date, time, nature of inquiry, actions taken, and responsible personnel.
    - Update the status of the inquiry as actions are taken.
5. **Escalation Process**
    - If the inquiry cannot be resolved within the first contact, escalate as follows:
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Situation	Escalation To	Timeline
Technical or policy-related issue	Subject matter expert/Manager	Within 2 hours
Unresolved after 24 hours	Supervisor/Manager	Immediately upon breach
Customer requests escalation	Supervisor/Manager	Immediately

    - Maintain customer communication during escalation.
6. **Follow-Up Actions**

- Confirm resolution with the customer and ensure satisfaction.
- Close the inquiry in the CRM system, noting customer feedback and any recommendations for improvement.
- For unresolved or recurring issues, flag for further review.

5. Records & Documentation

- All inquiry records must be maintained for a minimum of 12 months.
- Regularly review inquiry logs for patterns and potential training needs.

6. Performance Metrics

- Response time
- Resolution time
- Customer satisfaction ratings
- Number of escalations

7. Review & Continuous Improvement

This SOP will be reviewed annually or as needed to address process changes, feedback, and evolving customer requirements.

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