

SOP Template: End-of-Call Summaries and Confirmation Procedures

This SOP details the **end-of-call summaries and confirmation procedures**, emphasizing the importance of accurately summarizing key information discussed during calls, confirming understanding with all parties involved, documenting essential details, and ensuring follow-up actions are clearly outlined. The purpose is to enhance communication clarity, reduce misunderstandings, and improve accountability in customer service and business interactions.

Scope:

This SOP applies to all employees conducting business or customer service calls where communication accuracy and follow-up are essential.

Procedure

1. Summarize Key Points

At the conclusion of the call, verbally summarize the main topics discussed, agreements reached, and any critical information exchanged.

- Use clear and concise language.
- Highlight specific decisions, action items, and deadlines.

2. Confirm Understanding

Ask all parties to confirm their understanding of the summary. Use prompts such as:

“Does this summary capture everything correctly?”

“Is there anything that needs to be added or clarified?”

3. Document Essential Details

Immediately record the summarized points, agreements, and any required follow-ups in the designated system (CRM, call log, etc.).

- Include date, time, participants, and summary of the conversation.

4. Outline and Confirm Follow-up Actions

Clearly state who is responsible for each action item and provide specific timelines.

- Request verbal confirmation from all parties regarding their responsibilities.

5. Send Written Confirmation (if applicable)

Within an agreed timeframe (typically within 1 business day), email a written summary to all participants, including:

- Key points discussed
- Decisions made
- Assigned action items and deadlines

Roles and Responsibilities

- **Call Leader/Agent:** Responsible for summarizing, confirming, documenting, and initiating follow-up communication.
- **Participants:** Responsible for confirming accuracy and accepting responsibility for assigned action items.
- **Supervisors/Managers:** Ensure adherence to SOP and provide support for continuous improvement.

Best Practices

- Use standardized templates for written confirmations.
- Close every call with a summary, even if brief.

- Encourage open dialogue to confirm understanding and resolve ambiguities during the call.
- Store and organize call documentation for easy retrieval.

Revision History

Date	Version	Description	Author
2024-06-05	1.0	Initial release	Customer Service Manager