

Customer Service Standard Operating Procedure

Department: Customer Service

Version: [1.0]

Document ID: [SOP-DEPT-###]

Effective Date: [MM/DD/YYYY]

1. Purpose

This Standard Operating Procedure establishes guidelines for delivering consistent, high-quality customer service that meets organizational standards and exceeds customer expectations.

2. Scope

This procedure applies to all customer service representatives, team leads, and supervisors handling customer interactions across all communication channels.

This procedure applies to:

- Customer Service Representatives (phone, email, chat)
- Team leads and shift supervisors
- Quality assurance specialists
- Customer service managers
- Technical support staff interfacing with customers

Exclusions:

[Describe any activities, processes, or personnel NOT covered by this SOP]

3. Definitions

The following terms have specific meanings within this procedure. Defined terms are capitalized when used throughout this document.

Term	Definition
AHT	Average Handle Time - total time spent on a customer interaction
CSAT	Customer Satisfaction Score - metric measuring

	customer happiness
FCR	First Call Resolution - resolving issues in a single interaction
NPS	Net Promoter Score - measure of customer loyalty and advocacy
SLA	Service Level Agreement - defined response and resolution timeframes

4. Responsibilities

The following roles and positions have specific responsibilities for this procedure:

Role/Position	Responsibilities
[Customer Service Manager]	Will set service standards and ensure team performance meets targets
[Team Lead/Supervisor]	Will coach agents, handle escalations, and monitor queue performance
[QA Specialist]	Will evaluate interactions and provide feedback for improvement
[Customer Service Representatives]	Will handle customer inquiries professionally and document all interactions

5. General Procedures

5.1 Initial Customer Contact

1. Answer calls within 3 rings or respond to emails within 4 hours per SLA
2. Greet customer with standard greeting including company name and your name
3. Verify customer identity using approved security questions
4. Listen actively and allow customer to fully explain their concern
5. Express empathy and assure the customer you will assist them
6. Document the inquiry type and customer information in CRM

5.2 Issue Resolution Process

1. Identify the root cause of the customer's issue through questioning
2. Check knowledge base for standard resolution procedures
3. Apply approved solution or escalate if beyond your authority level
4. Confirm resolution with the customer and verify satisfaction
5. Document all actions taken and resolution details in CRM
6. Offer additional assistance before closing the interaction

5.3 Communication Standards

- ☐ Use positive, professional language at all times
- ☐ Avoid jargon and technical terms; use plain language
- ☐ Confirm understanding by paraphrasing customer concerns
- ☐ Provide clear timeframes for any follow-up actions
- ☐ Thank the customer for their patience and business
- ☐ Never argue with or interrupt the customer

6. Customer Satisfaction Metrics

Track and maintain the following service quality metrics. Review daily/weekly in team meetings:

Metric	Target	Current	Trend	Action Required
First Call Resolution (FCR)	>85%		Up/Down/Stable	
Customer Satisfaction (CSAT)	>90%		Up/Down/Stable	
Net Promoter Score (NPS)	>50		Up/Down/Stable	
Average Handle Time (AHT)	<8 min		Up/Down/Stable	
Email Response Time	<4 hrs		Up/Down/Stable	
Service Level (calls)	>80% in 60s		Up/Down/Stable	

7. Escalation Decision Matrix

Use the following matrix to determine appropriate escalation paths based on issue type and value:

	Tier 1 Agent	Team Lead	Supervisor	Manager
Billing Dispute	<\$100	\$100-\$500	\$500-\$1,000	>\$1,000
Technical Issue	Basic troubleshooting	Moderate complexity	Complex/recurring	Critical/outage
Service Complaint	First contact	Repeat issue	Escalated complaint	VIP/Social media
Legal/Regulatory	Refer to policy	Consult legal	Handle with legal	Required

Note: All escalations must include customer communication with expected resolution timeframe.

8. Service Recovery Protocol

When service failures occur, follow the HEARD recovery method:

- Hear: Listen to the complete customer complaint without interruption
- Empathize: Acknowledge the customer's frustration sincerely
- Apologize: Offer a genuine apology for the inconvenience caused
- Resolve: Take immediate action to correct the issue
- Diagnose: Identify root cause to prevent recurrence

8.1 Recovery Actions by Role

Recovery Action	Agent Authority	Team Lead Authority	Supervisor Authority
Sincere apology	Yes	Yes	Yes
Rush/expedited shipping	Yes	Yes	Yes
Discount (up to 15%)	No	Yes	Yes
Discount (15-25%)	No	No	Yes
Full refund	No	No	Yes
Complimentary product/service	No	Up to \$50 value	Up to \$200 value

9. Quality Assurance Checklist

Quality evaluations will assess interactions against the following criteria:

Item	Completed	Notes
Proper greeting and company/self identification	<input type="checkbox"/>	
Customer identity verification completed	<input type="checkbox"/>	
Active listening demonstrated throughout interaction	<input type="checkbox"/>	
Accurate information and solutions provided	<input type="checkbox"/>	
Professional and empathetic tone maintained	<input type="checkbox"/>	
Issue resolved or properly escalated with follow-up scheduled	<input type="checkbox"/>	
Complete and accurate documentation in CRM	<input type="checkbox"/>	
Appropriate closing with additional assistance offered	<input type="checkbox"/>	
Compliance with data security and privacy protocols	<input type="checkbox"/>	
Adherence to average handle time guidelines	<input type="checkbox"/>	

10. Emergency and Exception Procedures

10.1 Emergency Response

In case of emergency, follow the procedures below. Safety of personnel takes priority over all other considerations.

1. Ensure immediate safety of all personnel in the area

2. Contact emergency services if required (911 or local emergency number)
3. Notify supervisor/manager immediately
4. Follow facility emergency evacuation procedures if applicable
5. Document the incident using the Incident Report form

10.2 Exception Handling

When standard procedures cannot be followed due to unusual circumstances:

1. Assess the situation and identify the specific deviation required
2. Obtain verbal approval from [Supervisor/Manager] before proceeding
3. Document the exception, including justification and approver
4. Complete the Exception Request Form within 24 hours
5. Submit for formal review during the next scheduled procedure review

WARNING: Exceptions should only be made when necessary and must be properly documented. Repeated exceptions may indicate the need for procedure revision.

11. Related Information

The following documents and references relate to this procedure:

Category	Reference
Related Policies	Customer Service Policy, Data Privacy Policy, Refund and Return Policy
Related SOPs/Procedures	SOP-CS-002 Complaint Handling, SOP-CS-003 Social Media Response, SOP-CS-004 VIP Customer Program
Related Forms	Customer Feedback Form, Escalation Form, QA Evaluation Form, Service Recovery Form
External References	Industry benchmarking standards, Consumer protection regulations

12. Document Control

SOP Owner	[Customer Service Manager]
Approved By	[Director of Customer Experience / VP of Operations]

Contact Email	[customerservice@company.com]
Contact Phone	[(XXX) XXX-XXXX]
Review Schedule	Quarterly or upon changes to service offerings, tools, or feedback trends

13. Revision History

Document all revisions to maintain a complete audit trail:

Version	Date	Changes
1.0	[MM/DD/YYYY]	Initial release

14. Authorization and Approval

Name	Role	Signature	Date
	Prepared By		
	Reviewed By		
	Approved By		

15. Documentation of Training

I have read and understand the content of this Standard Operating Procedure. I have received training specific to the procedures, hazards, and emergency protocols described herein.

Note: All personnel who will perform tasks covered by this SOP must sign below prior to conducting any work. Additional signature pages may be attached as needed.

Printed Name	Signature	Date
[Manager/Supervisor]		

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