Internal Policy Document for Contoso Tech Support Agents

Comprehensive Guide for Assisting Customers

Introduction

Welcome to Contoso Tech's internal policy guide. This document provides detailed information on the policies and procedures that support agents must follow when assisting customers. Understanding and applying these policies consistently ensures a seamless experience for both customers and agents, strengthening the trust and reliability associated with the Contoso Tech brand.

Return Policy

Key Guidelines for Handling Returns

- Products can be returned within 30 days of purchase.
- Ensure the item is in its original condition, including packaging, accessories, and documentation. If any of these are missing, ensure to inform the customer about potential delays or denials in processing their return.
- Always request proof of purchase (receipt or invoice). Without it, returns cannot be processed.
- Inform customers that software, digital products, and custom-built machines are not eligible for returns unless proven defective. Escalate such cases to the technical team for verification.

Steps to Process a Return

1. Verify the customer's eligibility based on the above criteria.
2. Inspect the returned product for damage or missing components. Document the inspection thoroughly in the system.
3. Initiate the return process in the CRM system and provide the customer with a return confirmation number.
4. Advise customers on the expected refund timeline (up to 7 business days after approval).
5. Include notes on whether the shipping fee is refundable (e.g., only in cases of defective products or shipping errors).

Non-Refundable Items

Support agents must clearly communicate that the following items cannot be refunded:

- Opened software, licenses, or subscriptions.
- Products damaged by misuse, negligence, or unauthorized modifications.
- Gift cards and promotional items.

Warranty Policy

Warranty Coverage

All products sold by Contoso Tech include a 1-year warranty against manufacturing defects unless specified otherwise. Extended warranty options must be thoroughly explained to customers during transactions or inquiries.

- Eligible: Repair or replacement of defective hardware components.
- Not Eligible: Accidental damage, wear and tear, or damage caused by unauthorized repairs or modifications.

How to Process Warranty Claims

1. Verify the purchase date to confirm the warranty period.
2. Record a detailed description of the issue in the CRM system along with customer information.
3. Escalate complex or unclear cases to the technical team for assessment.
4. If valid, arrange for repair or replacement and provide updates to the customer throughout the process.
5. Ensure shipping costs for warranty claims are explained based on company policy (e.g., whether covered or the customer's responsibility).

Shipping Policy

Shipping Options

Agents must provide clear information about shipping options and timelines:

- Standard shipping: Delivers within 3–5 business days.
- Express shipping: Delivers within 1–2 business days.
- Free shipping: Available for orders over $100 (standard shipping only).

Order Tracking

Ensure customers receive tracking information via email upon shipment. If customers inquire about missing tracking details, verify their email address and order status in the system.

Privacy Policy

Agents must handle all customer data in strict compliance with Contoso Tech's privacy standards. Any breaches or concerns must be escalated immediately.

Data Collection and Use

- Customer data is collected solely for processing orders, improving services, and marketing (with explicit consent).
- Agents must never share or sell personal information to third parties.

Data Security

- Ensure all customer interactions are logged in the CRM system for security and record-keeping purposes.
- Assist customers who request data deletion by forwarding their request to the data compliance team.

Customer Support Procedures

Resolving Issues

1. Always listen actively to the customer's concerns and gather all necessary details.
2. Cross-check customer information with records in the CRM system.
3. Follow the outlined steps for returns, warranty claims, or shipping inquiries based on the policies above.
4. Escalate complaints or complex cases to the appropriate department or manager for resolution.
5. Document all interactions and resolutions in the CRM system for future reference.

Contact Information

Agents can direct customers to the following contacts where necessary:

- Email: support@contosotech.com
- Phone: 1-800-CONTOSO
- Support hours: Monday–Friday, 9:00 AM–6:00 PM

Policy Updates

Agents must stay informed about any amendments to Contoso Tech's policies. Regular training sessions and internal memos will be provided to ensure familiarity with changes. Always communicate updates to customers professionally and accurately.

Thank you for your dedication to Contoso Tech's mission of delivering outstanding service and support. Together, we ensure every customer interaction reflects the values of our brand.