

EMAIL PROCESS ACTIVITY (Enquiry/Request) – Same applies for Live Chat & Social Media					
SN	Standard Operating Procedures – Activities	Performer	Responsibility	Execution Timeline	Priority
1.	Read through customer's email for proper understanding of his/her enquiry/request.	Contact Center Agent	Contact Center Agent		High

2.	Log the issue on the appropriate portal and assign to responsible party	Contact Center Agent	Contact Center Agent	15mins	High
3.	Respond/acknowledge customer's message with the standard/approved greetings	Contact Center Agent	Contact Center Agent		High
4.	Provide customer with the required information where enquiry/request is a general one and does not relate to customer's account or other customer records with the bank, e.g., products, promos, branch location, etc.	Contact Center Agent	Contact Center Agent		High
5.	Send necessary forms to customer's mailbox if customer is unable to visit the BO or if the customer is abroad /Refer customer to the nearest PremiumTrust Business office where processing of request requires filling application forms and follow-up with customer if necessary.	Contact Center Agent	Contact Center Agent		High
6.	Advise customer to provide his/her phone number, call the PremiumCare lines or visit a branch for proper verification. Administer 5 - 7 security questions.  KYC/security questions to be administered where enquiry/request relates to customer account or other customer record with the Bank. e.g. (1) When was your account opened? (2) How much was last deposited or withdrawn from the account? (3) Address used in opening the account (4) what is the telephone number/email address used in opening the account? Etc.	Contact Center Agent	Contact Center Agent		High
7.	Responds to all security questions - Customer is expected to provide accurate response to at least 5 security questions	Contact Center Agent	Contact Center Agent		High
8.	Provide customer with required information where customer has satisfactorily answered the	Contact Center Agent	Contact Center Agent		High

	security questions. Where customer's response is not satisfactory, customer is politely referred to a branch for his/her enquiry/request (reason- you cannot see customer to know that you giving the information to the right person).				
10.	Follow-up with appropriate unit/branch till resolution and provide customer with update.	Contact Center Agent	Contact Center Agent		High
11.	Escalate enquiries/requests that are outside TAT to the Team Leader Head CFC where the team lead is not available	Contact Center Agent	Contact Center Agent		High
12.	Escalate enquiries/requests that are outside TAT to TL Resolution / TL Contact Centre and follow-up till resolution	Contact Center Agent	Contact Center Agent		High
EMAIL PROCESS ACTIVITY (Complaints)					
1.	Read through customer's email for proper understanding of his/her complaints.	Contact Center Agent	Contact Center Agent	15mins	High
2.	Log the issue on the appropriate portal and assign to responsible party	Contact Center Agent	Contact Center Agent		High
3.	Respond/acknowledge customer's email with the standard/approved greeting	Contact Center Agent	Contact Center Agent		High
4.	Send necessary forms to customer's mailbox if customer is unable to visit the BO or if the customer is abroad, refer customer to the nearest PremiumTrust Business office where resolution of complaint requires filling application forms. Agent is to follow-up with customer if necessary.	Contact Center Agent	Contact Center Agent		High
5.	Advise customer to provide his/her phone number, call the CFC lines or visit a branch for proper verification. Administer 5 - 7 security questions.  KYC/security questions to be administered where complaints relate to customer account or	Customer	Customer		High



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	other customer records with the Bank. e.g. (1) When was your account opened? (2) How much was last deposited or withdrawn from the account? (3) Address used in opening the account (4) what is the telephone number/email address used in opening the account?				
6.	Responds to all security questions - Customer is expected to provide accurate response to at least 5 security questions	Contact Center Agent	Contact Center Agent		High
7.	Provide customer with required information where customer has satisfactorily answered the security questions. Where customer's response is not satisfactory, customer is politely referred to a branch for his/her complaint (reason - you cannot authenticate customer physically to know that you are giving the information to the right person).	Contact Center Agent	Contact Center Agent		High
8.	The Video banking team once completely set up allows Agent engages the customer through a video section to carry out KYC on account mandate (passport and signature). Pending when this is implemented, the customer is advised to visit the branch.	Video Banking Team/Contact Centre Agent	Video Banking Team/Contact Centre Agent		
9.	Follow-up with appropriate unit/branch till resolution and provide customer with an update.	Contact Center Agent	Contact Center Agent		High
10.	Escalate complaints that are outside TAT to the Team Lead or Contact Center Manager where the team lead is not available	Contact Center Manager	Contact Center Agent		High
11.	Escalate enquiries/requests that are outside TAT to TL Resolution / TL Contact Centre and follow-up till resolution	Contact Center Agent	Contact Center Agent		High