

Customer Service Procedures

Company: Demo Business Solutions

Document Version: 2.1

Last Updated: January 2025

Overview

This document outlines standard procedures for handling customer interactions, complaints, and service requests to ensure consistent, professional service delivery.

Customer Complaint Resolution

Initial Response (Within 2 Minutes)

1. **Listen Actively** - Allow customer to fully explain their concern without interruption
2. **Acknowledge the Issue** - Use phrases like "I understand your frustration" or "Thank you for bringing this to our attention"
3. **Apologize Appropriately** - "I'm sorry this happened" (even if not our fault)
4. **Gather Information** - Ask clarifying questions to understand the full situation

Documentation Requirements

- **Log all complaints** in the customer service system
- **Record customer details:** Name, contact info, account number
- **Document the issue:** What happened, when, and any relevant details
- **Note resolution steps:** What actions were taken or promised

Resolution Authority Levels

Level 1 Staff can authorize:

- Refunds up to \$100
- Service credits up to \$50
- Product exchanges within 30 days
- Waive late fees under \$25

Manager approval required for:

- Refunds over \$100

- Service credits over \$50
- Policy exceptions
- Recurring billing adjustments

Escalation Process

1. **Attempt resolution** at your level first
2. **Explain escalation** to customer: "Let me get my manager who can better assist you"
3. **Brief the manager** privately before transfer
4. **Follow up** within 24 hours to ensure resolution

Refund Procedures

Standard Refund Criteria

- **Product returns:** Within 30 days with receipt
- **Service issues:** Within 14 days of service date
- **Billing errors:** Can be processed immediately
- **Defective products:** Any time within warranty period

Processing Steps

1. **Verify eligibility** using criteria above
2. **Check original payment method** in system
3. **Complete refund form** with customer signature
4. **Process refund** to original payment method when possible
5. **Provide receipt** and expected processing timeframe

Special Situations

No receipt: Manager approval required, store credit only **Past return window:** Case-by-case basis, manager decision **Used/damaged items:** Partial refund at manager discretion **Digital services:** Pro-rated refunds based on usage

Difficult Customer Management

De-escalation Techniques

1. **Stay calm and professional** - Never match their energy level
2. **Use their name** - "Mr. Johnson, I want to help you resolve this"

3. **Find common ground** - "We both want to get this fixed quickly"
4. **Offer choices** - "Would you prefer a refund or exchange?"
5. **Set realistic expectations** - Give accurate timeframes

When to Involve Security/Management

- Customer becomes verbally abusive toward staff
- Threats of any kind are made
- Customer refuses to follow store policies after explanation
- Situation escalates beyond your comfort level
- Customer appears under the influence

Documentation for Difficult Situations

- **Time and date** of incident
- **Customer information** (if available)
- **Witnesses present** (staff or customers)
- **Detailed description** of what occurred
- **Actions taken** and outcome
- **Manager notification** (required for all incidents)

Phone Etiquette Standards

Answering Calls

- **Answer within 3 rings** whenever possible
- **Professional greeting:** "Thank you for calling [Company Name], this is [Your Name], how may I help you?"
- **Transfer protocol:** "May I place you on a brief hold while I connect you?" (wait for response)

Hold Procedures

- **Maximum hold time:** 2 minutes before checking back
- **Check-in phrase:** "Thank you for holding, I'm still working on that for you"
- **Offer callback:** If wait exceeds 5 minutes, offer to call back

Voicemail Standards

- **Check messages** every 2 hours during business hours

- **Return calls** within 4 hours (same business day)
- **Voicemail greeting:** Professional, current, includes expected response time

Email Response Guidelines

Response Time Standards

- **Acknowledgment:** Within 2 hours during business hours
- **Full response:** Within 24 hours for simple inquiries
- **Complex issues:** Within 48 hours (with status update at 24 hours)

Email Template Structure

1. **Greeting:** "Dear [Customer Name]"
2. **Acknowledgment:** "Thank you for contacting us regarding..."
3. **Response/Solution:** Clear, specific information
4. **Next steps:** What happens next, if anything
5. **Contact info:** How to reach us for follow-up
6. **Professional closing:** "Best regards, [Your Name]"

Customer Follow-Up Procedures

When Follow-Up is Required

- All complaint resolutions within 48 hours
- Service appointments within 24 hours after completion
- Product returns/exchanges within one week
- Any situation where customer expressed dissatisfaction

Follow-Up Methods

1. **Phone call** - Preferred for complaints or service issues
2. **Email** - Appropriate for order confirmations or updates
3. **Text message** - Only if customer has opted in
4. **In-person** - For regular customers during next visit

Follow-Up Script Examples

Post-complaint: "Hi [Name], I'm calling to make sure we fully resolved your issue with [specific problem]. Is everything working well now?"

Post-service: "Hello [Name], I wanted to check that you're satisfied with the [service] we completed yesterday. Do you have any questions?"

Quality Assurance

Service Standards Checklist

- ✓ Greeting completed within 30 seconds
- ✓ Customer needs identified and addressed
- ✓ Professional demeanor maintained throughout
- ✓ Resolution offered or escalation completed
- ✓ Follow-up scheduled when appropriate
- ✓ Documentation completed in system

Monthly Performance Metrics

- **Response time:** Average time to acknowledge customer
- **Resolution rate:** Percentage resolved without escalation
- **Customer satisfaction:** Based on follow-up surveys
- **Complaint volume:** Trends and common issues

Emergency Customer Situations

Medical Emergency

1. **Call 911 immediately**
2. **Provide basic first aid** if trained
3. **Clear the area** of other customers
4. **Notify management** as soon as possible
5. **Document incident** thoroughly

Theft or Security Concerns

1. **Do not confront** suspected shoplifters directly
2. **Notify security/management** immediately
3. **Observe and document** behavior discreetly
4. **Cooperate with authorities** if called
5. **Complete incident report**

System Outages

1. **Apologize for inconvenience**
2. **Explain situation** honestly: "Our system is temporarily down"
3. **Offer alternatives:** Manual processing, callback when restored
4. **Provide realistic timeframe** for resolution
5. **Document affected customers** for follow-up

Training Requirements

New Employee Training

- **Customer service basics:** 4-hour initial training
- **Company policies:** 2-hour overview
- **System training:** 3 hours hands-on
- **Shadow experienced staff:** Minimum 8 hours
- **Certification quiz:** Must score 85% or higher

Ongoing Training

- **Monthly team meetings:** Service tips and policy updates
- **Quarterly reviews:** Individual performance and goals
- **Annual recertification:** Customer service standards
- **Special situations training:** As needed based on incidents

This document should be reviewed quarterly and updated as needed. All staff must acknowledge receipt and understanding of these procedures.