**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=12401&utm_source=template-word&utm_medium=content&utm_campaign=SEO)Customer Service SOP Template**



Customer   
Service   
Standard Operating

Procedures

COMPANY NAME

Street Address

City, State, and Zip

webaddress.com

Version 0.0.0

Date: MM/DD/YY

Department Responsible: Name

| Version History | | | |
| --- | --- | --- | --- |
| Version No. |  | Current Version Date |  |
| **Effective Date** |  | **Expiration Date** |  |
| **Responsible Person** |  | **Signature** |  |
| **Writer** |  | **Approval** |  |

**Introduction**

*Describe the purpose of your customer service department - who your customers are and what their needs are.*

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**Customer Service Procedures**

User Responsibilities

*Describe what customers are expected to do to ensure their inquiries are resolved (e.g., provide accurate information, submit requests through approved channels, respond promptly to follow-ups).*

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| **Contact Channels** (Phone, Email, Chat, In-Person, Web Form) |
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| **Inquiry Logging Method** |
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| **Resolution Process** |
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| **Response And Resolution Time Frames** |
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| **Escalation Procedure** |
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**Customer Service System**

*Describe what the customer can expect after submitting an inquiry: acknowledgement, tracking (e.g., confirmation email or case number), progress updates, and closure. Indicate how to re-open or escalate unresolved or unsatisfactory cases.*

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**Customer Service Staff Responsibilities**

*Outline the commitments of customer service staff. For example, treating all customers with respect, using clear and empathetic communication, following company service guidelines, and escalating issues appropriately. If there are specific service standards (e.g., response time, courtesy rules, or service level agreements), describe them here.*

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**Customer Service Operating Hours**

*Describe when customer service is available.* *Include any extended or emergency coverage procedures and specify how customers will be informed of operating hours.*

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**Customer Service Workflow**

*Describe the step-by-step process of handling a customer inquiry from initial contact to resolution. Include how inquiries are logged, acknowledged, routed to the appropriate agent or department, resolved, and closed.*

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**Customer Service Flowchart**

*Use the flowchart to show how cases move through the system.*

STEP

START / END

INPUT / OUTPUT

DOCUMENT

DECISION

**YES**

**NO**

CONNECTORS

**KEY**

**YES**

**NO**

COPY AND PASTE

BLANK ICONS

BELOW

**YES**

**NO**

**Priority Matrix**

*Customize this priority matrix to define your organization’s prioritization and escalation procedure. This helps determine how to categorize and respond to customer issues.*

|  |  |
| --- | --- |
| Critical | Urgent customer issues that severely impact the customer relationship or business operations (e.g., major service failure, repeated unresolved complaint, safety concern). Must be addressed immediately and escalated to a manager. |
| High | Significant customer issue affecting multiple customers or causing strong dissatisfaction (e.g., billing error, incorrect shipment, service disruption). It should be resolved within the same business day. |
| Medium | Routine customer inquiries or complaints that impact service but do not stop business operations (e.g., general product issue, delayed response). Resolution expected within 2–3 business days. |
| Normal | General information requests or minor issues (e.g., FAQ-type questions, small adjustments). Handled in the normal course of operations. |

**Escalation**

*Describe your formula for escalating customer issues For example, define when an agent should involve a supervisor, and identify escalation contacts and procedures.*

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**Examples**

*Provide sample case scenarios to illustrate how the SOP works.*

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