

## CUSTOMER SERVICE DEPARTMENT SAMPLE OPERATING PROCEDURES

*The information contained herein is designed to be general in nature and is offered as suggestions for improving business practices. Please use this information as a guide only.*

1. Receive written service request form from contractor / homeowner.
2. Date and time stamp service request.
3. Send service request acknowledgement to contractor / homeowner.
4. Log service request on service request tracker.
5. Call contractor / homeowner to schedule inspection appointment.
6. Assign inspection.
7. Inspect items, take notes and photos.
8. If service is denied, explain to the contractor / homeowner in person or by phone within 1 day. It should be confirmed with follow-up letter or email.
9. If item is to be serviced, issue work order and log on service work order tracker.
10. Distribute work order copies:
  - to trade contractor/or customer service repairman
  - email / fax to contractor / homeowner with letter confirming warranty coverage
  - file in trade appropriate file or database.
11. Store / file incomplete work orders in; a three-ring binder, task file, or data base indexed by contractor / homeowner or issue.
12. Upon completion of the work, both the contractor and or homeowner should sign a copy of the work order and provide you with a signed copy.
13. Contact contractor / homeowners to confirm completion and satisfaction with work performed. If anyone indicate dissatisfaction, schedule an re-inspection to check on the quality of the work perform the repair or explain to the person the appropriate next step.
14. Write completion date on Service Work Order. File the work orders in the appropriate customer service files.

**IMPORTANT:** *Paladin Risk Management, Ltd. is a risk management consultancy company and the information it provides should not be interpreted as insurance, coverage, or legal advice. The information provided should be interpreted in line with insurance and legal methodologies as they relate to your business practices and/or procedural guidelines.*

## CUSTOMER SERVICE DEPARTMENT SAMPLE OPERATING PROCEDURES continued

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15. Notify accounting and affected trades of any back charges.
16. Review the Service Work Orders weekly for work orders that are expired or about to expire. Call trade contractors, and Homeowners if necessary, for explanation of delay and write it on the work order copy in the trade contractor binder.
17. Send letter to trade contractors not in compliance with service agreements describing actions taken as a result. (i.e., having funds held, back charges, or, in severe cases, being replaced).
18. Compile monthly reports based on Service Work Order Tracker. Distribute reports to management, sales, and other departments as appropriate.

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