STANDARD OPERATING PROCEDURE

Inbound Call Handling SOP

Document no.	SOP-CS-002
Revision	1.0
Owner	Customer Service Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To make sure inbound customer calls are answered promptly, callers are verified and understood, requests are resolved or routed correctly, and every call is documented consistently.

2. Scope

Applies to live inbound phone calls to the customer service line, from answering through call wrap-up. Email, chat and formal complaint escalations are covered by their own SOPs.

Definitions

Average speed of answer	The average time callers wait before an agent picks up.
Call wrap-up	The after-call work an agent completes, such as logging notes, before taking the next call.
Warm transfer	Transferring a call after briefing the receiving agent, rather than blindly connecting the caller.
Verification questions	The standard questions used to confirm a caller's identity before discussing account details.

3. Responsibilities

Support Agent	Answers, verifies, resolves or transfers calls, and logs the outcome.
Team Lead	Receives transferred calls outside agent scope and reviews call quality.
Quality Analyst	Reviews recorded calls monthly for quality and coaching opportunities.

RACI matrix

Activity	Support Agent	Team Lead	Quality Analyst
Answer and verify the caller	R/A	I	-
Resolve or transfer the call	R/A	C	-
Log the call and complete wrap-up	R/A	I	-
Review calls for quality and coaching	I	C	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Phone or call handling system
- CRM
- Standard greeting and verification script
- Knowledge base
- Call quality scorecard

5. Procedure

Step	Task	Owner	Done
5.1	**Answer with the standard greeting** The Support Agent answers within the target number of rings using the standard greeting, stating the company name, their own name, and offering to help. **Checkpoint:** The greeting includes the company name, the agent's name, and an offer to help, every time.	Support Agent	☐
5.2	**Verify the caller's identity** The Support Agent verifies the caller using the standard verification questions before discussing any account-specific details. **Warning:** Never discuss account details before identity is verified, even if the caller sounds familiar or is in a hurry.	Support Agent	☐
5.3	**Confirm the reason for the call** The Support Agent listens to the caller's request and takes notes, then confirms back what they understood before proceeding.	Support Agent	☐
5.4	**Research the request** The Support Agent searches the knowledge base and the caller's account history for relevant information to address the request.	Support Agent	☐
5.5	**Resolve directly if possible** The Support Agent resolves the request directly when it is within their ability and authority, explaining the solution clearly to the caller.	Support Agent	☐
5.6	**Place the caller on hold correctly** If research takes time, the Support Agent asks permission before placing the caller on hold and checks back at regular intervals rather than leaving them waiting silently.	Support Agent	☐
5.7	**Perform a warm transfer if needed** If the request is outside the agent's scope, the Support Agent briefs the receiving Team Lead or specialist on the situation before connecting the caller. **Checkpoint:** The receiving agent has been briefed with the caller's issue before the caller is transferred, so they don't have to repeat everything.	Support Agent	☐
5.8	**Summarize before ending** The Support Agent summarizes the resolution or agreed next steps back to the caller before ending the call.	Support Agent	☐
5.9	**Log the call** The Support Agent logs the call in the CRM with the category, resolution and any follow-up action needed.	Support Agent	☐

Step	Task	Owner	Done
5.10	**Complete wrap-up tasks** The Support Agent finishes any remaining after-call tasks, such as filing notes or triggering a follow-up, within the target wrap-up time.	Support Agent	☐
5.11	**Flag calls needing follow-up** The Support Agent flags any call that requires further action to the appropriate owner, with a due date and context.	Support Agent	☐
5.12	**Review calls monthly** The Quality Analyst reviews a sample of recorded calls each month against the call quality scorecard and shares coaching feedback with the Team Lead.	Quality Analyst	☐

6. Quality checks

- Calls are answered within the target speed of answer.
- Identity is verified before any account details are discussed.
- Every call is logged in the CRM with category and resolution.
- Transfers include a briefing to the receiving agent before connecting the caller.

7. Records

- Call log entry in the CRM
- Call recording, where retained
- Monthly call quality scorecard

8. KPIs

- Average speed of answer
- First-call resolution rate
- Average call handling time
- Call quality score from monthly reviews

9. Common mistakes

- Discussing account details before verifying the caller's identity.
- Performing a cold transfer without briefing the receiving agent first.
- Ending the call without summarizing the agreed next steps.
- Skipping the CRM log after a call that felt too quick to bother logging.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

This is a template. Adapt it to your organization, equipment and local regulations before use.

Scan for the latest version

Opens this template online, where you can download it again in Word, PDF, Excel or CSV — free, no sign-up.

Or add it to Perfect Wiki so your team can find it and ask questions about it in Microsoft Teams, Slack, kChat or Mattermost.