STANDARD OPERATING PROCEDURE

Email Support SOP

Document no.	SOP-CS-003
Revision	1.0
Owner	Customer Service Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To make sure customer emails are triaged, claimed, answered within target response times, and resolved with accurate, clear and complete written replies.

2. Scope

Applies to inbound support emails and the shared support inbox, from receipt to resolution and follow-up. Phone, chat and formal complaints are covered by their own SOPs.

Definitions

Response time target	The maximum time allowed between an email arriving and the first reply being sent.
Canned response	A pre-written template used as a starting point for a common type of question.
Thread claim	Marking an email as being worked on to prevent another agent from replying at the same time.
No-response period	The time after which a thread with no customer reply is automatically closed.

3. Responsibilities

Support Agent	Triages, claims, drafts and sends replies, and updates templates for new question types.
Team Lead	Maintains the auto-acknowledgment setup and supports agents on complex threads.
Quality Analyst	Reviews a sample of sent replies weekly for tone, accuracy and completeness.

RACI matrix

Activity	Support Agent	Team Lead	Quality Analyst
Triage and claim the email	R/A	I	-
Draft and verify the reply	R/A	C	-
Send reply and set follow-up	R/A	I	-
Review reply quality weekly	I	C	R/A

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

4. Materials and PPE

Materials, tools and systems

- Shared support inbox
- Canned response template library
- Knowledge base
- CRM or ticketing system
- Response time target reference

5. Procedure

Step	Task	Owner	Done
5.1	**Confirm the auto-acknowledgment** The Team Lead confirms the shared inbox sends an automatic acknowledgment on arrival, stating the expected response time to the customer.	Team Lead	☐
5.2	**Triage new emails** The Support Agent sorts new emails into the correct queue, such as billing, technical or general, based on the content of the message.	Support Agent	☐
5.3	**Claim the email** The Support Agent claims the email in the shared inbox before starting work on it, so another agent doesn't reply at the same time. **Checkpoint:** No two agents work the same thread at once; the claim is visible to the whole team.	Support Agent	☐
5.4	**Read the full thread** The Support Agent reads the entire thread history, including any prior agent notes, before drafting a reply. **Warning:** Replying without reading earlier messages causes repeated questions and frustrates the customer.	Support Agent	☐
5.5	**Draft the reply** The Support Agent drafts a clear, complete reply, using an approved template as a starting point where one fits, and personalizing it to the actual question.	Support Agent	☐
5.6	**Verify facts before sending** The Support Agent checks account details, order numbers, dates and amounts in the draft reply against the account record before sending. **Checkpoint:** Every amount, date and order number in the reply matches the account record exactly.	Support Agent	☐
5.7	**Send within the target time** The Support Agent sends the reply within the response time target defined for the queue.	Support Agent	☐
5.8	**Set a follow-up reminder** If resolution depends on another team or a customer action, the Support Agent sets a follow-up reminder for the appropriate date.	Support Agent	☐
5.9	**Close the thread** The Support Agent closes the thread once the customer confirms resolution, or after the defined no-response period has passed.	Support Agent	☐
5.10	**Update the template library** The Support Agent adds or updates a canned response template if the email answered a new or previously undocumented type of question.	Support Agent	☐

Step	Task	Owner	Done
5.11	**Review reply quality weekly** The Quality Analyst reviews a sample of sent replies each week for tone, accuracy and completeness, and shares feedback with agents.	Quality Analyst	☐

6. Quality checks

- Every email receives an auto-acknowledgment on arrival.
- Replies are sent within the target response time.
- Account details in replies are verified against the record before sending.
- A weekly quality sample review is completed and feedback shared.

7. Records

- Email thread in the ticketing system or inbox
- Reply quality review notes
- Template library updates

8. KPIs

- Average first response time
- Average resolution time
- Percentage of emails resolved without customer follow-up
- Reply quality score from weekly reviews

9. Common mistakes

- Two agents replying to the same thread because it wasn't claimed.
- Sending a reply without checking that account details are correct.
- Using a generic template without personalizing it to the actual issue.
- Leaving a thread open indefinitely with no follow-up reminder set.

10. Revision history

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

Approval

Prepared by	Approved by	Date

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