STANDARD OPERATING PROCEDURE

# Retail Customer Service SOP

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| **Document no.** | SOP-RTL-008 |
| **Revision** | 1.0 |
| **Owner** | Store Manager |
| **Effective date** | September 15, 2026 |
| **Review cycle** | Every 12 months |

## 1. Purpose

To give every customer helpful, consistent service from greeting through checkout, and to resolve problems in a way that keeps their business.

## 2. Scope

Applies to face-to-face customer interactions on the sales floor and at checkout. Phone, email, and online chat support are covered by the customer service department's own SOPs.

### Definitions

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| **Service recovery** | The actions taken to make things right for a customer after a service failure or complaint. |

## 3. Responsibilities

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| **Sales Associate** | Greets customers, helps them find products, and follows up on any promise made during the interaction. |
| **Cashier** | Offers the store's standard solution for issues raised at checkout, within their approval limit. |
| **Store Manager** | Approves exceptions outside standard policy and reviews recurring complaint trends with the team. |

### RACI matrix

| Activity | Sales Associate | Cashier | Store Manager |
|---|---|---|---|
| Greet and identify customer needs | R/A | I | I |
| Answer policy and pricing questions | R/A | C | I |
| Offer a standard service recovery | C | R/A | I |
| Approve an exception to policy | I | C | R/A |
| Review recurring complaint themes | C | C | R/A |

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

## 4. Materials and PPE

### Materials, tools and systems

- POS terminal
- Product knowledge guide or catalog
- Customer feedback forms or tablet
- Store return and service policy sheet

## 5. Procedure

| Step | Task | Owner | Done |
|---|---|---|---|
| 5.1 | **Greet every customer promptly**<br>Greet each customer within the first 30 seconds of entering your area, using a genuine greeting rather than a scripted line said without eye contact. | Sales Associate | ☐ |
| 5.2 | **Ask open questions about their need**<br>Ask what the customer is looking for or what they're trying to accomplish, using open questions rather than yes-or-no questions. | Sales Associate | ☐ |
| 5.3 | **Guide them using product knowledge**<br>Recommend products based on what the customer described, using the product knowledge guide for details you don't already know rather than guessing. | Sales Associate | ☐ |
| 5.4 | **Answer policy questions accurately**<br>Check the current return, price-match, or promotion policy sheet before answering a policy question you're unsure about, rather than giving an answer that might be wrong. | Sales Associate | ☐ |
| 5.5 | **Listen fully to a complaint**<br>Let the customer finish explaining the problem without interrupting, and repeat back what you heard to confirm you understood it correctly. | Sales Associate | ☐ |
| 5.6 | **Offer a solution within authority**<br>Offer the store's standard solution for the issue, such as an exchange, discount, or replacement, if it's within your authority to approve. | Cashier | ☐ |
| 5.7 | **Escalate exceptions to a manager**<br>When a solution falls outside standard policy or the customer remains unsatisfied, bring in the store manager to review the situation and decide on an exception.<br>**Checkpoint:** Any exception granted outside standard policy is approved and logged by the store manager. | Store Manager | ☐ |
| 5.8 | **Follow up on a promised action**<br>If you promise to call a customer back, order an item, or check on something, do it by the time you said you would, and update them if it will take longer. | Sales Associate | ☐ |
| 5.9 | **Assist across departments**<br>If a customer's need spans more than one department or product area, walk them to the right associate or area instead of pointing and leaving them to find it alone. | Sales Associate | ☐ |
| 5.10 | **Log unresolved or notable issues**<br>Record any complaint that required an exception, remained unresolved, or revealed a recurring problem in the customer service log for follow-up and trend review. | Store Manager | ☐ |

| Step | Task | Owner | Done |
|---|---|---|---|
| 5.11 | **Review recurring issues with the team**<br>Bring up recurring complaint themes at a team huddle or meeting so associates understand the pattern and how to handle it consistently. | Store Manager | ☐ |

## 6. Quality checks

- Customers are greeted within 30 seconds of entering the department on observation checks.
- Complaints requiring an exception are approved and logged by a manager.
- Promised follow-up actions are completed by the date given to the customer.
- Recurring complaint themes are reviewed with the team at least monthly.

## 7. Records

- Customer feedback forms
- Customer service and complaint log
- Manager exception approvals

## 8. KPIs

- Customer satisfaction score from surveys or feedback cards
- Percentage of complaints resolved on first contact
- Average time to resolve escalated complaints

## 9. Common mistakes

- Interrupting a customer before they finish explaining a problem.
- Promising a follow-up and not delivering it.
- Guessing at a policy answer instead of checking the policy sheet.
- Not looping in a manager when a customer remains unsatisfied.

## 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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