# **Example SOP Document:**

## **Title: Customer Onboarding Process SOP**

SOP ID: SOP-001
Version: 1.0
Effective Date: January 1, 2024
Approval: John Smith, Operations Manager
Review Date: January 1, 2025

## **1. Purpose**

This SOP outlines the process for onboarding new customers, ensuring a seamless and consistent experience across all customer-facing teams. The goal is to provide a professional and smooth transition from the sales team to customer support.

## **2. Scope**

This procedure applies to the Customer Support, Sales, and Account Management teams in all office locations. It includes tasks such as account setup, data entry, initial training, and follow-up communication.

## **3. Responsibilities**

- Sales Team: Provide the necessary customer information to the Account Management team.
- Account Management Team: Set up the customer's account, schedule the first meeting, and provide product training.
- Customer Support Team: Ensure the customer is satisfied with the service and resolve any issues post-onboarding.

## **4. Procedure**

Step 1: Customer Information Transfer
- Action: Sales Team must transfer all relevant customer data (contact details, needs analysis, etc.) to the Account Management system within 24 hours of contract signing.
- Responsible: Sales Representative
- Tools/Systems: CRM (Salesforce)

Step 2: Account Setup
- Action: Account Manager sets up the customer in the company’s internal system (Billing, CRM, Support system).
- Responsible: Account Manager
- Tools/Systems: Internal CRM

Step 3: Initial Meeting and Training
- Action: Schedule a 1-hour onboarding call to walk the customer through product features and answer any questions.
- Responsible: Account Manager
- Tools/Systems: Zoom, Training Materials

Step 4: Customer Feedback
- Action: Send a satisfaction survey to the customer within 48 hours of the onboarding session.
- Responsible: Customer Support Team
- Tools/Systems: SurveyMonkey

## **5. Definitions**

- CRM: Customer Relationship Management software.
- Onboarding: The process of helping new customers understand and begin using the company's products or services.

## **6. Safety or Compliance Considerations**

Ensure customer data privacy is maintained during the onboarding process as per GDPR guidelines.

## **7. References**

- Customer Data Privacy Policy (Document #123)
- CRM User Manual (Document #456)

## **8. Appendices**

- Appendix A: Customer Onboarding Checklist
- Appendix B: Onboarding Call Script