

SOP No	2.010B
Effective Date	03.2014
Revision Date	
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## CUSTOMER SERVICE GUIDELINES

### 1 PURPOSE

1.01 This document establishes guidelines for handling requests and inquires.

### 2 TEAM FUNCTIONS

2.01 The following priorities should be followed in the execution of daily assignments by the Customer Service Representatives.

TEAMS FUNCTIONS	DUTIES
Customer Service & Experience	Provide a professional, pleasant and helpful experience to all customers via Email, Phone, In-Person, etc.
Data Processing and Archival	CMMS Request Processing, Scanning, Call Log, Estimate Approval, Estimate Archival, Key Request Review, Key Request Log.
Rapid Response	Dispatching and information collecting.

### 3 SERVICE LEVELS/TIERS

3.01 As requests and inquiries are received by Customer Service Representatives they may find that some request cannot be handled immediately. Below are guidelines for determining how to sort these requests. They are divided into three tiers. Each tier lists the individual(s) responsible for the tier, the timeline for completing the tier, and general description of the work that qualifies for the tier.

I	II	III
Customer Service Representative	Planner Scheduler	Appropriate Administrator
Any problem or request that can be provided within 1 to 2 business days.	Any request or maintenance that requires planning, permitting, scheduling or follow up beyond 2 business days. This should be completed within 5 business days.	Any work that must be performed by a Project Manager or requires FD&O MPP Approval to Proceed.
<ul style="list-style-type: none"> <li>• Do It Now Dispatching for Troubleshooting and/or repair.</li> <li>• Basic Customer Inquiries or Status Updates.</li> <li>• Request Processing into CMMS (Work Orders)</li> <li>• Pre-Approved Time and</li> </ul>	<ul style="list-style-type: none"> <li>• Requests requiring scheduling.</li> <li>• Shutdown Requests.</li> <li>• Requests requiring review, estimating, or change orders.</li> <li>• Inquiries beyond the technical knowledge of</li> </ul>	<ul style="list-style-type: none"> <li>• Project Management projects requiring PDC work, new construction, space changes, or MPP review and/or approval</li> <li>• Event Support and Planning.</li> </ul>



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<p>Materials Work Order Processing.</p> <ul style="list-style-type: none"><li>• Transfer to Level II Planning and Support.</li><li>• Transfer to Level III</li></ul>	<p>Customer Service Desk Staff.</p> <ul style="list-style-type: none"><li>• Requests for schedule changes on an existing Work Order.</li><li>• Transfer to Level III</li></ul>	
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