CORPORATE WRITING & DOCUMENTATION

Customer Enquiry Handling Policy and Procedure

HarvestBridge Foods Ltd
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DOCUMENT CONTROL

Document owner	Business Manager
Approved by	Managing Director
Review cycle	Annual or when operating arrangements change

This sample provides a practical internal process for handling customer enquiries from first contact through response, follow-up and closure.

1. Purpose

This document sets out a consistent process for receiving, recording, assigning and responding to customer enquiries. It is intended to help the team provide clear information, follow up appropriately and keep a usable record of customer communication.

2. Scope

This procedure applies to employees who receive or respond to enquiries through the company's business email, telephone, website contact form or approved messaging channels. It covers product availability, pricing requests, order questions, delivery enquiries and general business enquiries.

3. Guiding principles

Enquiries should be acknowledged courteously, handled within a reasonable period, directed to a staff member who can respond accurately and recorded in the approved enquiry register. Staff must not promise stock, prices, delivery dates or other terms until the relevant information has been checked.

4. Roles and responsibilities

Customer-facing staff receive enquiries, capture the required details and provide information within their authority. The Sales Officer reviews product and pricing requests and coordinates quotations. The Operations Officer confirms stock, dispatch and delivery information. The Business Manager handles complaints or requests requiring management approval.

5. Procedure

5.1 Receive the enquiry: Record the date and time, customer's name, preferred contact details, enquiry channel and a short description of the request. Ask only for information needed to respond.

5.2 Acknowledge receipt: Confirm that the enquiry has been received. If an immediate answer is not possible, tell the customer when they can reasonably expect an update.

5.3 Check the information: Confirm product details, current prices, stock position, delivery coverage and any relevant conditions with the responsible officer before giving a definite answer.

5.4 Assign and respond: Direct the enquiry to the appropriate staff member. The response should answer the question directly, identify any conditions and state the next step, such as requesting order quantities or issuing a quotation.

5.5 Record the outcome: Update the enquiry register with the response date, staff member responsible, status and any agreed follow-up action.

5.6 Follow up: Where the customer has requested a quotation or further information, follow up on the agreed date. Do not send repeated messages where the customer has asked not to be contacted.

6. Response and escalation

The receiving staff member should acknowledge an enquiry during the same business day where practicable. If a complete response requires checks by another team, provide an update rather than leaving the customer without a reply. Complaints, disputed transactions, unusual credit requests or commitments outside approved terms must be referred to the Business Manager.

7. Customer information and records

Customer information must be used only for handling the enquiry and related business communication. Access to the enquiry register should be limited to staff who need it for their work. Do not record payment card details, passwords or unrelated personal information. Follow the company’s approved retention and privacy arrangements when storing or disposing of records.

8. Enquiry register: minimum fields

The enquiry register should contain: reference number; date received; customer name; contact channel and details; enquiry category; brief enquiry summary; assigned staff member; date of response; current status; next action and due date; and closure date.

9. Monitoring and review

The Business Manager should periodically review open enquiries, overdue follow-ups and recurring customer questions. This procedure should be reviewed when business channels, responsibilities or operating arrangements change.

10. Approval and document control

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PORTFOLIO DISCLOSURE

HarvestBridge Foods Ltd and this policy scenario are fictional. The document was prepared as an illustrative writing and documentation sample, not as an adopted policy or legal compliance certification. A real organisation should adapt the procedure to its actual operations, privacy obligations and approval structure.

Prepared as a portfolio sample by InkMedia Creatives Services Ltd.