Customize with your information → **Insert Your Company Name/Logo Here**

P-720-A
Customer Related Processes

Documents are all numbered to comply with document control requirements

1.0 Purpose

1.1 This procedure describes the process used for communicating with customers and reviewing information from the customer, including customer feedback.

2.0 Responsibilities

2.1 *Customer Service or Sales and Marketing Representatives* are responsible for taking orders from clients, determining customer requirements, and reviewing the orders for acceptance.

2.2 *Project Managers* are responsible for communicating with the client, keeping them informed as the project progresses, and getting feedback from the client.

3.0 Definitions

3.1 None

Requirements of the standard are all addressed

4.0 Equipment/Software

4.1 No additional equipment or software required.

5.0 Instructions

5.1 Request for *product or service:*

5.1.1 Orders are accepted *electronically or by phone, fax or mail.*

5.1.2 When a *customer service or sales and marketing* representative receives a request for *product or services* from a client or a potential client, *the representative* identifies and documents customer requirements.

5.1.3 *Identify how you determine all customer requirements for each type of order.*

1. For example, for orders received electronically, by fax or by mail, the order is reviewed using a checklist *(Create a checklist for your organization, and enter your form number here)* to make sure all required information has been provided.

1. Required information includes: *(list your required information here. Include information important to your product such as:*

- *Catalogue number or other ID*
- *Quantity*
- *Statutory and regulatory requirements*
- *Additional requirements that Your Organization identifies*

Recommendations for customization are included in blue type

5.1.4 *Customer service* reviews the requirements to make sure:

1. The client requirements are adequately defined,

1. If *Your Company* is unable to meet the requirements *customer service* will contact the client to resolve the differences between what you can provide and customer requirements, or tell the customer you cannot provide the *product or service.*

During the early review stages and while assessing the customer requirements, you can document their needs on a Client assessment memo, F-720-001.

5.1.5   If *Your Company* is able to meet the requirements, accept the *order, contract or project.*

5.1.6   *If a confirmation will be sent to the customer describe the steps here.*

1.   necessary. If it is, he or she initiates a corrective action request.

1.   Customer feedback is requested from clients by using scheduled customer surveys and routine calls to the customer.

   ▪   *Project managers make routine calls to the customer as the project requires, and at the end of the project to ask the customer if requirements were met or exceeded.*

1.   Customer feedback, including complaints is measured and analyzed according to the Monitoring, Measuring and Analysis of Customer Feedback procedure (P-821).

6.0   Forms and Records

6.1   *Customer feedback spreadsheet*

6.2   *Order forms*

6.3   *Customer Inquiry Form*

6.4   *Client assessment memo, F-720-001*

7.0   Attachments

7.1   None

8.0   Related Documents

8.1   P-821 Monitoring, Measuring and Analysis of Customer Feedback

8.2   P-852 Corrective Action

8.3   P-853 Preventive Action

Related forms, records and documents are referenced to comply with document control requirements.

9.0   References

9.1   None

10.0   Revisions

Revision	Date	Section	Paragraph	Summary of change	Authorized by
A				Initial issue	