

Simple Customer Service Policy Template

Business name: [Your business name]

Customer service promise:

We aim to treat customers with respect, respond in a timely manner, communicate clearly, and take reasonable steps to fix problems when something goes wrong.

Response time standards:

- Phone calls: [response time]
- Text messages: [response time]
- Emails: [response time]
- Website forms: [response time]
- After-hours messages: [policy]
- Urgent issues: [policy]

How we handle complaints:

When a customer has a complaint, our team will:

1. Listen without interrupting.
2. Thank the customer for explaining the issue.
3. Acknowledge the concern.
4. Ask for the details needed to understand what happened.
5. Review the facts before promising a solution.
6. Explain the next step and timeline.
7. Follow up after the issue is addressed.

Refund, credit, or fix-it policy:

Our first priority is to understand the issue and determine whether we can reasonably fix it. If our business made a mistake, we may offer a correction, replacement, credit, partial refund, or other fair solution depending on the situation.

Refunds or credits over [amount] require manager approval.

Employee authority:

Employees may:

- Apologize for inconvenience
- Gather information
- Explain the policy
- Offer approved solutions
- Reschedule appointments

Escalate issues when needed

Employees may not:

- Promise refunds outside the policy
- Admit legal responsibility
- Argue with customers
- Offer large discounts without approval
- Ignore safety issues
- Respond emotionally to negative reviews

Escalation rules:

Employees must contact a manager or owner when:

- A customer requests a refund over [amount]
- A customer threatens legal action
- A customer threatens a bad review
- The issue involves safety, injury, property damage, or major financial impact
- The employee is unsure what to do
- The customer becomes abusive
- The complaint involves a repeat problem

Communication standards:

Our team should be calm, respectful, clear, and professional. We do not blame customers, argue, or make promises we cannot keep. When needed, we confirm important details in writing.

Follow-up process:

After a complaint is resolved, we follow up within [timeframe] to confirm the customer is satisfied and ask whether anything else is needed.

Review schedule:

This policy should be reviewed every [quarter/six months/year] or whenever repeat customer issues appear.