Customer enquiry handling (contact centre)

Process Definition Document (PDD): template and worked example

Example company (fictional): Fjällby Energi AB, a household electricity and gas supplier in Sweden with a contact centre in Gothenburg (about 260 employees and 480,000 customers).

Document control

Field	Value
Process name	Customer enquiry handling (contact centre)
Process owner	[Name, role]
Prepared by	[Name]
Reviewed by	[Names of the people who do the work]
Approved by	[Name, date]
Version	1.0 (as-is)
Status	Draft

How to use this template

This is a complete process definition document (PDD) for customer enquiry handling in a contact centre, also called inbound customer service, customer support or service desk handling. It describes how a contact arrives by phone, email, chat or web form, how the customer is identified, how the agent tries to resolve it at the first contact with the help of a knowledge base, how it is routed to the back office when that is not possible, how the answer is followed up against a service level and how the contact is closed and quality checked. The company is fictional, but the roles, systems and exceptions are typical of a utility or subscription business with a mid-sized contact centre.

Use it as a starting point. Replace the company details, keep the sections, and listen to a morning of live calls before you change anything, because the real reasons customers contact you are rarely the ones in the dashboard. Most contact centres change the identification checks, the service levels per channel and the rules for when an agent may hand a case on. Complaints, sales calls, outbound campaigns and collections are left out on purpose, because they follow their own procedures.

- Replace the company, the contact centre platform and the customer system with yours. List the channels you really have, and drop chat if you do not offer it.
- Set your own identification checks. Check with your data protection officer which items are acceptable for which actions, and write a stricter list for changes of bank details and address.
- Define the service levels per channel and per back-office queue and show them to the customer in the confirmation message.
- Write down the agent's limits as numbers: credit, payment date extension and changes to the contract. Agents hand on far less once they know what they may decide.
- Make the reason list short and stable. Thirty to forty reasons that agents can choose in a few seconds give better data than two hundred that nobody reads.

1. Purpose and scope

This procedure describes how Fjällby Energi AB handles customer enquiries, from the moment a customer makes contact to the moment the contact is closed with an answer the customer accepts and the reason for the contact is coded. It gives agents, team leaders, the back office and the quality team one shared description of who does what, so

that customers get a correct answer the first time, enquiries that cannot be answered at once are handed on with the whole story and a deadline, and the company learns from what customers ask about.

In scope

- Inbound enquiries by phone, email, chat and the web form from household customers
- Identification and data protection checks before any account information is given
- First-contact resolution using the knowledge base and the customer account
- Routing of enquiries to the billing, meter and move-in back-office teams
- Follow-up with the customer and tracking against service levels
- Closing, contact reason coding and monthly quality sampling

Out of scope

- Complaints, which follow the complaint handling procedure
- Outbound sales calls and marketing campaigns
- Collections and payment arrangement calls
- Business customers with a key account manager
- Emergency reports of gas leaks, which go straight to the network operator

2. Process at a glance

Item	Description
Trigger	A customer contacts the company by phone, email, chat or web form with a question, a request or a problem with their account or supply.
Starts when	The contact is received and routed to an agent or placed in the email and form queue.
Ends when	The customer has an answer or a confirmed next step, the contact is closed with a reason code and, where the enquiry went to the back office, the customer has been told the outcome.
Inputs	The customer's question in any channel, Customer account, contract, meter and billing data, Knowledge base articles and call scripts, Identification details given by the customer, Service level targets per channel and per enquiry type
Outputs	Contact record with reason code and outcome, Answer or action on the account, Back-office case with the full history, where needed, Confirmation or follow-up message to the customer, Quality score for sampled contacts, Monthly report on volumes, resolution and service levels
Volume	About 1.1 million contacts a year: 58% phone, 22% email and web form, 20% chat, with a peak in January and February when the winter bills arrive and a second peak at the end of June
Working hours	Phone and chat Monday to Friday, 08:00 to 19:00, and Saturday 09:00 to 13:00. Email and web form are accepted at any time. Targets: 80% of calls answered in 30 seconds, chat answered in 60 seconds, email answered within 1 working day.

3. Roles and responsibilities

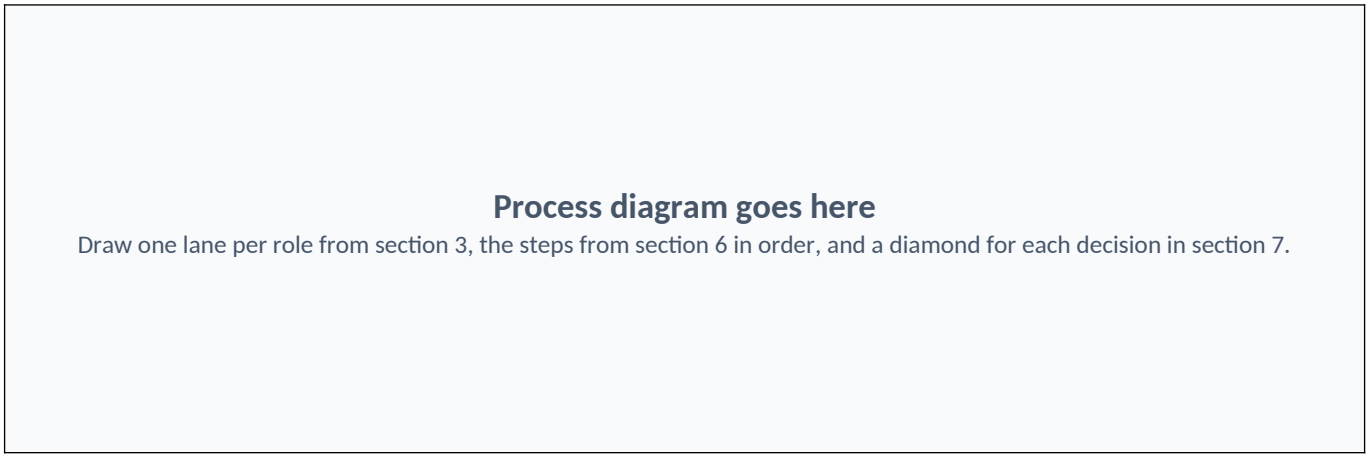
Role	Responsibilities
Customer (external)	Makes contact, proves who they are, describes the issue and confirms whether the answer solved it.
Contact Centre Agent	Answers calls, chats and emails, identifies the customer, resolves the enquiry using the account and the knowledge base, and hands it on with a full description when it needs the back office.
Team Leader	Manages the queues and the schedule, takes escalated contacts, approves exceptions outside the agent's limits and coaches agents from their sampled contacts.
Back-Office Specialist	Handles enquiries that need a decision or a change the agent cannot make, such as

Role	Responsibilities
	billing corrections, meter data disputes and contract changes, and replies within the agreed time.
Knowledge Manager	Writes and maintains the knowledge base articles, publishes changes before campaigns and price changes, and retires outdated articles.
Quality Coach	Samples contacts, scores them against the standard, runs calibration sessions and gives feedback to agents and team leaders.
Workforce Planner	Forecasts volumes by channel, builds shifts and breaks and tells the team leaders when the service level is at risk.
CRM and telephony (system)	Routes contacts, records calls, creates the contact record, runs the service level clocks and sends the closing message.

4. Systems

- Zendesk: tickets for email, form and chat, and back-office cases
- Genesys Cloud: phone routing, queues and call recording
- Customer information system: accounts, contracts, meters and bills
- Knowledge base inside Zendesk
- Meter data platform provided by the network operator
- Customer survey tool
- Workforce management tool for forecasting and schedules

5. Process map



6. Procedure, step by step

#	Step	Who	What happens	System	Output
1	Make contact	Customer	Contacts the company with a question about a bill, a meter reading, a move, a contract or the price. About 58% choose the phone, even when the answer is in the online account.	Phone, email, chat, web form	Contact received
2	Route the contact	CRM and telephony (system)	Phone callers choose a topic in the menu and are queued by skill. Emails and forms are sorted by topic and language and placed in the ticket queue. Chats are routed to the next available agent.	Genesys Cloud, Zendesk	Contact in the right queue

#	Step	Who	What happens	System	Output
3	Open the contact and greet the customer	Contact Centre Agent	Takes the contact, reads any earlier tickets on the same number or email address and states the agent's name. For email, reads the whole message before replying. This takes under 30 seconds.	Zendesk, customer information system	Contact open with history in view
4	Identify the customer	Contact Centre Agent	Asks for two items from the account, for example the customer number, the delivery address, or the last four digits of the bank account, and checks them. On chat and email the customer is also asked to log in or reply from the registered address. No account detail is given before this check is passed. About 4% fail the check.	Customer information system	Customer identified
5	Handle a failed identification	Contact Centre Agent	Gives only general information, explains what the customer needs to bring, and offers to send a letter or an email to the address on file. The agent notes the failure in the contact. No exceptions are made for urgency.	Customer information system, Zendesk	General answer given and note made
6	Understand the real question	Contact Centre Agent	Asks open questions, repeats the issue in one sentence to confirm it and chooses the contact reason from a fixed list of 35 reasons. About 18% of contacts have a different real question from the one in the first sentence.	Zendesk	Reason confirmed
7	Search the knowledge base and the account	Contact Centre Agent	Looks for the article for the reason, checks the account, contract and last bills, and works out the answer. For bill queries the agent compares the last two bills and the meter readings. This takes 2 to 5 minutes.	Knowledge base, customer information system, meter data platform	Answer or action identified
8	Resolve at first contact	Contact Centre Agent	Gives the answer, carries out the change the agent is allowed to make, such as a reading entered, an address updated or a payment date moved by up to 10 days, and checks that the customer understands. About 72% of contacts are resolved at the first contact.	Customer information system, Zendesk	Enquiry resolved
9	Ask a team leader about an exception	Contact Centre Agent	When a request is outside the agent's limits, for example a goodwill credit above 300 SEK or a late reading from a previous period, asks the team leader. The reply takes 5 to 15 minutes on average, and the customer is kept informed. About 3% of contacts need this.	Zendesk, chat	Exception decision
10	Decide the exception	Team Leader	Reads the case, applies the exceptions guide and approves, changes or refuses the request. Anything above 1,000 SEK or without a precedent goes to the back office.	Zendesk, customer information system	Approved, changed or refused
11	Route the enquiry to the back office	Contact Centre Agent	Creates a back-office case with the customer's question, what has already been checked, the documents attached and what the customer has been told. Chooses the queue (billing, meter data or contract changes) and the priority. About 22% of contacts go to the back office. Cases with missing information are returned to the	Zendesk	Back-office case with full history

#	Step	Who	What happens	System	Output
			agent.		
12	Tell the customer what happens next	Contact Centre Agent	States who will deal with the enquiry, what they will do and by when, using the service level for the type, such as 3 working days for a billing correction and 5 for a meter dispute. The customer gets a confirmation by email with the case number.	Zendesk, phone, email	Customer informed with a date
13	Investigate and decide	Back-Office Specialist	Checks the data, asks the network operator where needed, corrects the account or explains why the bill is right, and writes the reply for the customer. Cases waiting for the network operator are marked pending with a reason, and the clock stops only for that reason.	Zendesk, customer information system, meter data platform	Decision and reply text
14	Reply to the customer	Back-Office Specialist	Sends the answer in plain words, with the corrected amounts and any dates, and phones the customer when the result is bad news or the amount is above 2,000 SEK. About 6% of back-office replies lead to a new contact from the customer.	Zendesk, email	Reply sent
15	Track service levels and chase open cases	Team Leader	Reviews the open cases twice a day. Cases at 80% of their service level are marked amber and cases past it red. Red cases are chased with the specialist the same day. The team leader also redistributes queues when waiting times rise.	Zendesk, workforce management tool	Chased cases and rebalanced queues
16	Adjust the forecast and shifts	Workforce Planner	Compares the forecast with actual volumes every morning, checks for bill runs and campaigns and moves breaks, training and overtime to protect the service level. During the winter bill run the plan is updated twice a day.	Workforce management tool	Updated shift plan
17	Close the contact	Contact Centre Agent	Confirms that the question is answered, selects the outcome (resolved, handed on, customer will call back, cannot help), writes a two-line summary and sets the final contact reason. The summary must be readable by someone who has not spoken to the customer. This takes 1 to 2 minutes.	Zendesk	Closed contact with reason code
18	Send the closing message and survey	CRM and telephony (system)	Sends a short message with a summary of what was agreed and invites the customer to rate the contact. About 14% answer the survey. Tickets with no customer reply after 5 working days are closed automatically.	Zendesk, survey tool	Summary message and survey sent
19	Sample and score contacts	Quality Coach	Reviews 8 contacts per agent per month, chosen at random across channels, against a form that covers identification, correctness, tone, ownership and the closing summary. Contacts with a low survey score are added. Calibration sessions with team leaders run every two weeks.	Zendesk, Genesys Cloud	Scores and feedback
20	Update the knowledge base from what customers ask	Knowledge Manager	Reads the top 20 contact reasons and the contacts handed on after a failed search, rewrites unclear articles and adds missing ones. Articles for price changes and campaigns are published before the first customer letter goes out.	Knowledge base, Zendesk	Updated articles

7. Decision points and business rules

- Has the customer passed the identification check? No: only general information is given (step 5). About 4% of contacts.
- Is the question what the customer first said it was? No: the agent asks again and recodes the reason (step 6). About 18% of contacts.
- Can the agent resolve it with the knowledge base and the account? Yes: resolved at the first contact (step 8). About 72% of contacts.
- Is the request outside the agent's limits? Yes: the team leader decides, and above 1,000 SEK the back office (steps 9 and 10). About 3% of contacts.
- Does the enquiry need a data change or decision the agent cannot make? Yes: route to the back office with the full history (step 11). About 22% of contacts.
- Is the case at 80% of its service level? Yes: it goes amber and the team leader chases it (step 15).
- Does the customer's message express dissatisfaction and ask for something to be put right? Yes: it is passed to the complaint handling procedure at once (step 17).

8. Exceptions

- Customer calls about a gas smell or a safety risk (under 1%): the agent gives the network operator's emergency number first, then records the contact. Identification is not required for the safety information.
- Caller wants to act for a relative (about 3%): the agent needs the account holder's written authority or the account holder on the line before changing anything.
- Customer reaches the contact centre by all channels at once, calls, chats and emails the same question (about 5%): the tickets are merged and one agent replies once.
- Outage of the telephony or the customer information system: agents switch to a read-only knowledge base and a paper log, take callback numbers and the team leader announces the expected recovery time. Callbacks are completed within one working day.
- Peak weeks during the winter bill run: the call target moves from 30 seconds to 90 seconds, a recorded message gives the self-service option and chat is limited to 3 conversations per agent.

9. Controls

- No account information is given before two identification items have been checked, and a failed check is recorded in the contact.
- Every contact has a reason code and an outcome. The system does not let an agent close the contact without both.
- Agents can only make changes within their limits. Anything above the limit needs the team leader, and the approval is stored in the case.
- Calls are recorded and tickets keep the full history. Access to recordings is limited to team leaders and the quality team and is logged.
- Sampling is random and covers every agent every month, and the same form is used by the quality coach and the team leaders.
- Back-office clocks may be paused only for a listed reason, and the pause reason is reviewed weekly.
- Knowledge base changes for price changes are approved by the product owner before publication.

10. Known issues today

- Customers phone for questions that the online account answers, and the volume rises by 40% in the bill run weeks.
- Agents hand on contacts without the full story, so the back office writes back to the agent before it can start.

- The same customer contacts through three channels and receives three different answers, because tickets are not merged.
- Knowledge base articles for new tariffs are published after the first customers call.
- Back-office cases wait for the network operator's meter data, and the customer is not told that the delay is outside the company's control.
- Reason codes are chosen by the agent in a hurry, and 'other' is used for about 15% of contacts.

11. RACI matrix

R = responsible (does the work), A = accountable (owns the outcome), C = consulted, I = informed.

Activity	Agent	Team Leader	Back Office	Knowledge Manager	Quality Coach	Workforce Planner
Identify the customer and understand the question	A/R	I			C	
Resolve the enquiry at first contact	A/R	C		C		
Decide an exception outside the agent's limits	R	A	C			
Route and describe a back-office case	A/R	C	I			
Investigate and reply to the customer	I	C	A/R	C		
Track service levels and chase open cases	I	A/R	R			C
Forecast volumes and plan shifts	I	C				A/R
Sample contacts and give feedback	I	C			A/R	
Update the knowledge base	C	C	C	A/R	C	

12. KPIs

KPI	Definition	Target
First-contact resolution	Share of contacts closed with no further contact on the same reason from the same customer within 7 days. Today 72%, target 78%.	[set]
Service level	Share of calls answered within 30 seconds, chats within 60 seconds and emails within 1 working day. Target: 80% on calls and chat, 95% on email.	[set]
Average handling time	Average minutes of talk, hold and wrap-up per contact, by channel and by contact reason.	[set]
Back-office turnaround	Working days from the creation of a back-office case to the reply to the customer, by queue, measured against each queue's service level.	[set]
Quality score	Average score from sampled contacts on the standard form, and the share of contacts that fail on identification.	[set]
Customer satisfaction	Average rating from the survey after the contact, with the response rate shown next to it.	[set]
Contact reasons avoidable by self-service	Share of contacts whose reason has a self-service answer in the online account, tracked by reason.	[set]

13. Revision history

Version	Date	Author	Change
1.0	[date]	[name]	First as-is version

Free template from processfix.ai. You may copy and adapt it. The company in the example is fictional.