

Customer Related Processes

1.0 Purpose/Scope

- 1.1 The purpose of this procedure is to describe the process for communicating with customers and determining and reviewing requirements related to products and services provided by [Your Company](#).
- 1.2 The procedure applies to the requests and orders received for [products or services](#).

2.0 Responsibilities and Authorities

- 2.1 The [Sales and marketing manager](#) has the prime responsibility and approval authority for this procedure.
- 2.2 In support of the [Sales and marketing manager](#), the [Customer service or Sales representatives](#) are responsible for taking orders from clients, determining customer requirements, and reviewing the orders for acceptance.
- 2.3 Additional responsibilities for [sales and marketing / customer service / project or account managers / production control](#) personnel are detailed in relevant paragraphs of section 5.0 below.

3.0 References and Definitions

- 3.1 References
 - 3.1.1 This document relates to clause 8.2 of the ISO 9001:2015 standard, Determination of requirements for products and services
- 3.2 No definitions

4.0 Resources

- 4.1 None

5.0 Instructions

- 5.1 In support of the planning procedure P-810 for Operational planning and control, this procedure addresses the customer related processes.
- 5.2 Communication with customers includes providing information relating to products and services, handling enquiries, contracts or orders, including changes, obtaining customer feedback relating to products and services, including customer complaints, handling or controlling customer property, establishing specific requirements for relevant contingency actions.
 - 5.2.1 The requests and orders for product or service are accepted [electronically or by phone, fax or mail](#).

Customer Related Processes

- 5.2.2 When a [customer service or sales and marketing rep](#) receives a request for [products or services](#) from a client, the [representative](#) identifies and documents customer requirements.
- 5.2.3 [Identify how you determine all customer requirements for each type of order.](#)
- [For example](#), for orders received electronically, by fax or by mail, the order is reviewed using a checklist ([Create a checklist for your company, and enter your form number here, F-820-xxx](#)) to make sure all required information has been provided.
 - [For example](#), for orders received by telephone the [sales rep](#) uses the checklist to collect all required information from the customer and documents the information in the [order database](#). Requirements are confirmed with the customer before acceptance.
 - [For example](#), contracts or sales agreements may be negotiated between the customer and [sales or management](#) for orders and these contracts are reviewed and approved. Information from the contract is entered into the [order database](#) under the customer number so the customer may place multiple orders under the contract. When [customer service](#) receives an order that is part of a negotiated contract, the information in the order is reviewed against the information in the [order database](#).
- 5.2.4 Required information includes: ([list your required information here. Include information important to your product such as](#)):
- [Catalogue number or other identification](#)
 - [Quantity](#)
 - [Delivery date](#)
 - [Special requirements](#)
 - [Regulations that apply](#)
 - [Delivery, installation and service](#)
 - [Requirements unstated by the customer](#)
 - [Statutory and regulatory requirements](#)
 - [Handling or treatment of customer property](#)
 - [Specific requirements for contingency actions](#)
 - [Additional requirements that your company identifies.](#)

5.3 The determination of customer requirements to be offered to customers is

Customer Related Processes

performed.

5.3.1 [Customer service or Sales and marketing representatives](#) take the orders from clients, determine their requirements, and review their orders to ensure.

- The client requirements are adequately defined,
- [Your Company](#) has the ability to meet the requirements and can substantiate the claims for the products and services it offers.
- Any requirements that are different than previously expressed are resolved.
- When [Your Company](#) is unable to meet the requirements [customer service](#) contacts the client to resolve the differences between what you can provide and what the customer requires, or inform the customer you cannot provide the [product or service](#).
- When a documented statement of requirements is not provided, the customer requirements are confirmed by [customer service](#) before acceptance.

5.3.2 During the early review stages and while assessing the customer requirements, their needs are documented on the Client assessment report, F-820-001.

5.4 Following the determination of the customer requirements, the process to review their needs is carried out.

5.4.1 Prior to [Your Company's](#) commitment to supply products and services, [Customer service or Sales and marketing rep](#) review the customer requirements [and those of interested parties](#) to ensure coverage and review of:

- Requirements specified by the customer,
- Requirements for delivery and post-delivery activities,
- Requirements not stated by the customer, but necessary for the specified or intended use,
- Additional statutory and regulatory requirements applicable to the products and services,
- Contract or order requirements differing from those previously expressed.

5.4.2 When [Your Company](#) is able to ensure that it has the ability to meet the requirements, the [order, contract or project](#) is accepted and confirmation

Customer Related Processes

of order is provided for order entry into the production schedule.

- The production order, form F-820-002 is issued by the **production control department** to schedule the production. **Describe how you will initiate the customer order through your order entry process. For example, you may want to have a work instruction, WI-820-xxx to detail the steps for order entry**
- **State how you will indicate that the contract has been reviewed and approved. For example, customer service will sign and date the order to indicate approval. Or, customer service will enter their initials in the database to indicate approval.**
- **When a confirmation is to be sent to the customer describe the steps here.**

5.4.3 Documented information of the reviews, including any new or changed requirements for the products and services is controlled and retained with procedure P-750 for Control of documented information.

5.4.4 Upon completion of an order, the **order file** records provide the evidence that **Your Company** has delivered an order, has demonstrated the ability to meet the requirements and can substantiate the claims for the products and services it offers.

5.5 Contract / Order / Project Amendments

5.5.4 When the client or **Your Company** initiates a change to an approved **contract / order / project**, an amendment is required.

5.5.5 The **representative or project manager** and the client discuss the effects of the amendment. If both parties agree to the changes they are **confirmed by the customer and documented in the order database.**

5.5.6 Where requirements are changed, **the project manager** is responsible for communicating the changes to all employees that need to know about the changes, and relevant documents are amended and controlled with the procedure P-750.

5.6 Customer communication

5.6.1 **Project or account managers** are responsible for communicating with the client, keeping them informed as the **order / project** progresses, and getting feedback from the client.

- Product information is communicated to the customer by **product information sheets, catalogues, communication from sales and marketing, and internet information.**
- Printed information is reviewed and approved before release

Customer Related Processes

according to the control of documentation procedure.

- Sales and marketing information is maintained in a [controlled database](#).

5.6.2 Enquiries, contracts or order handling ([Describe your process for client communication, an example is included here to show the type of information to include](#))

- Orders are received by [customer service](#), and the [customer service representative](#) is responsible for communication through order acceptance.
- Once the order is accepted, a [project manager](#) is assigned. The project manager is responsible for communication with the client after order acceptance. The [project manager](#) keeps the client informed and gets client approval on [Your Company](#) initiated contract amendments.

5.6.3 Customer feedback ([Describe your process for soliciting, handling and recording client feedback. An example is included below to show the type of information to include](#))

- The [project manager or customer service](#) may receive customer feedback. Employees that receive feedback from customers are responsible for communicating the information to [Customer service or the Project manager](#).
- All customer feedback is recorded in the [customer feedback database](#). ([If you do not have that type of database set up, another option would be to maintain a file of customer feedback. The key is to design it so you can measure and analyze feedback.](#))
- The [sales representative or project manager](#) that receives the inquiry takes immediate action as necessary to satisfy the client. The [project manager](#) determines if the inquiry is a complaint and if corrective action is necessary. If it is, he or she initiates a corrective action request as outlined in the procedure P-1020 for Nonconformity and corrective action.
- Customer feedback is requested from clients by using scheduled customer surveys and routine calls to the customer. Feedback information is reviewed and analyzed as outlined in the procedure P-912 for Customer satisfaction.

6.0 Forms and Documented Information

6.1 Forms / Records

6.1.1 F-820-001 Client assessment report

Customer Related Processes

- 6.1.2 F-820-002 Production order
- 6.1.3 Order database
- 6.1.4 Customer feedback spreadsheet
- 6.1.5 Order forms
- 6.1.6 Customer Inquiry Form
- 6.2 Documented information / Related processes
 - 6.2.1 P-600 Planning for the Quality management system
 - 6.2.2 P-750 Control of documented information
 - 6.2.3 P-810 Operational planning and control,
 - 6.2.4 P-912 Customer satisfaction
 - 6.2.5 P-1020 Nonconformity and corrective action

7.0 Opportunities and Risks

- 7.1 The planning procedure P-600 for Planning for the Quality management system addresses opportunities and risks (risk-based thinking).
- 7.2 As applicable to your company, make use of your organizational knowledge, lessons learned and experience with the activities associated with **Customer related processes** to determine the opportunities and risk that need to be addressed and that can:
 - Give assurance that the procedure can achieve its intended result(s),
 - Enhance desirable effects, and prevent or reduce undesired effects,
 - Achieve improvement.

8.0 Revision History

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