KJBeats

Standard Operating Procedure

Customer Account Update Workflow

Issue Date:	[Date]	Prepared by:	Kaitlyn Book
Revision Date:	[Date as needed]	Approved by:	[Name]

Purpose/Summary Statement:

This document outlines the standardized process for updating customer account information to ensure data accuracy, compliance, and consistent record management.

Purpose:

To provide clear, repeatable instructions for updating customer account records while maintaining documentation accuracy and workflow consistency.

Scope:

Applies to team members responsible for maintaining customer account records and managing account update requests.

Definitions/Key Terms:

CRM
Customer Relationship Management system used to store and manage account records.

Account Update Request
A request to modify customer information (e.g., name, email, billing details).

Verification
The process of confirming identity before making record changes.

Record Note
A documented summary of what was changed, when, and why.

Roles & Responsibilities:

POSITION	ROLES & RESPONSIBILITIES
Operations Team Member	• Process account update requests • Verify customer identity • Update customer records • Documented completed changes
Team Supervisor	• Support workflow escalations • Monitor update accuracy • Approve exceptions when required

Procedure:

Workflow Ownership

The Customer Account Update Workflow is maintained by designated operations personnel responsible for ensuring requests are completed accurately and documented appropriately.

Task Execution Requirements

All update requests must include:

- Verified customer identification
- Confirmed update details
- Required documentation or supporting information

Incomplete requests should be returned for clarification.

Account Update Process

1. Verify customer identity and confirm update request details.
2. Access the CRM system and review existing account records.

3. Apply approved updates to the account record.
4. Perform quality review to ensure data accuracy.
5. Document update completion and relevant workflow notes.

Escalation & Issue Resolution

Escalate requests when:

- Customer identity cannot be verified
- Update requests conflict with documentation
- System access or data discrepancies occur

Workflow Monitoring & Review

Supervisors should periodically review account update logs to ensure compliance with workflow standards and identify process improvement opportunities.

Materials/Tools Used:

- CRM platform
- Account verification checklist
- Documentation tracking system

Related SOPs:

- SOP 02 - Customer Account Management Standards
- SOP 05 - Data Accuracy & Record Integrity
- SOP 08 - Customer Communication Guidelines

Compliance:

Failure to adhere to this SOP may result in:

- Inaccurate customer records
- Data integrity issues
- Customer service delays

Adherence is required unless otherwise approved by Operations Leadership.

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SOP Review & Maintenance:

This SOP shall be reviewed:

- upon system or CRM updates
- during process optimization initiatives
- at the direction of Operations Leadership

Revisions shall be documented in the SOP history log.