

A PRACTICAL CHECKLIST FOR SMALL BUSINESSES IN GHANA

Customer Service SOP Starter Checklist

Is your customer service consistent — or does it depend on who is available?

A customer should not receive excellent service simply because the business owner happens to be available that day. As your business grows, you need processes that help your team deliver a consistent customer experience — whether the customer contacts you through WhatsApp, Instagram, phone, email or in person.

Use this checklist to assess how prepared your business is.

How to use it: Tick if the process is clearly documented and consistently followed. Leave it blank if it is missing, unclear, or handled differently each time.

1. CUSTOMER ENQUIRY & RESPONSE

Can your team handle customer enquiries consistently?

- ☐ We have a standard way of greeting customers.
- ☐ We have defined business hours for responding to enquiries.
- ☐ We have a target response time for customer messages.
- ☐ Staff know what information they must provide before closing an enquiry.
- ☐ We have standard responses for frequently asked questions.
- ☐ We know how to handle enquiries when the requested information is unavailable.
- ☐ Unanswered enquiries are tracked and followed up.
- ☐ Staff know when an enquiry should be escalated.

Score: ____ / 8

2. WHATSAPP CUSTOMER SERVICE

Is your WhatsApp business communication professional and organised?

- ☐ Customers receive a professional greeting.
- ☐ Our business profile contains accurate information.
- ☐ We communicate our business hours clearly.
- ☐ Customer enquiries do not depend entirely on one person's phone.
- ☐ Orders received through WhatsApp are properly recorded.
- ☐ Payment confirmations are properly tracked.
- ☐ Customer addresses and delivery details are recorded accurately.
- ☐ Staff know how to hand over a customer conversation.
- ☐ Unresolved WhatsApp conversations are followed up.
- ☐ Important customer information is not left buried in chat history.

Score: ____ / 10

3. ORDER CONFIRMATION & FULFILMENT

Does every customer order follow a clear process?

- ☐ We have a standard process for receiving orders.
- ☐ We confirm the customer's order before fulfilment.
- ☐ We verify payment before processing the order.
- ☐ We confirm product/service availability.
- ☐ We record the customer's delivery/contact details.
- ☐ Customers receive an order confirmation.
- ☐ Customers receive relevant delivery updates.
- ☐ Someone is responsible for monitoring outstanding orders.
- ☐ We confirm successful delivery or completion.
- ☐ We have a process for handling delayed or failed deliveries.

Score: ____ / 10

4. COMPLAINT HANDLING

What happens when something goes wrong?

- ☐ We have a documented complaint-handling process.
- ☐ Staff know how to listen without becoming defensive.
- ☐ Staff know how to acknowledge a customer's concern professionally.
- ☐ Complaints are recorded.
- ☐ We investigate complaints before deciding on a solution.
- ☐ Staff know what they are authorised to resolve themselves.
- ☐ We have a clear escalation process.
- ☐ Customers are told when they should expect a resolution.
- ☐ We follow up after resolving a complaint.
- ☐ We analyse complaints to identify recurring problems.

Score: ____ / 10

5. REFUNDS, RETURNS & EXCHANGES

Are your policies clear enough to prevent confusion?

- ☐ We have a written refund policy.
- ☐ We have a written return/exchange policy where applicable.
- ☐ Customers are informed of these policies before purchase where appropriate.
- ☐ Staff understand the policies.
- ☐ Staff know when a refund can be approved.
- ☐ Staff know who has authority to approve exceptions.
- ☐ Refund requests are documented.
- ☐ Refunds are processed within a defined timeframe.
- ☐ Customers are informed about the progress of their request.
- ☐ Exceptions are documented and reviewed.

Score: ____ / 10

6. CUSTOMER FOLLOW-UP

Does the relationship end when the customer pays?

- ☐ We confirm successful delivery or service completion.
- ☐ We follow up with customers after purchase where appropriate.
- ☐ We ask customers for feedback.
- ☐ We record important feedback.
- ☐ We respond to negative feedback.
- ☐ We identify opportunities for repeat business.
- ☐ We have a process for requesting reviews or referrals.
- ☐ We maintain customer information appropriately for future communication.

Score: ____ / 8

7. CUSTOMER ESCALATION

Does your team know when to involve a supervisor or owner?

- ☐ We have defined situations that require escalation.
- ☐ Staff know their decision-making limits.
- ☐ Staff know who to escalate an issue to.
- ☐ Escalated complaints are properly documented.
- ☐ The person handling the escalation has access to the relevant customer information.
- ☐ Customers are not repeatedly asked to explain the same problem to different staff members.
- ☐ Escalated cases are followed through until resolution.

Score: ____ / 7

Your Customer Service SOP Score

Add your scores from the seven sections.

Total Score: _____ / 63

50-63: Strong Foundation

You have several important customer service processes in place. Your next step is to review whether your team is actually following them consistently. A documented SOP that nobody follows is still a process gap.

35-49: Room for Improvement

You have some processes, but there are likely inconsistencies. Focus on the areas with the lowest scores and document those processes first.

Below 35: Your Business Needs a Process Reset

Your customer service may currently depend too heavily on individual staff members or the business owner. Start small — choose your three most important customer interactions and document those processes first.

Your SOP Priority Map

Use this section to identify the first SOPs your business should create.

SOP	Priority
Customer Enquiry & Response	☐ High ☐ Medium ☐ Low
WhatsApp Customer Service	☐ High ☐ Medium ☐ Low
Order Confirmation & Fulfilment	☐ High ☐ Medium ☐ Low
Complaint Handling	☐ High ☐ Medium ☐ Low
Refunds, Returns & Exchanges	☐ High ☐ Medium ☐ Low
Customer Follow-Up	☐ High ☐ Medium ☐ Low
Customer Escalation	☐ High ☐ Medium ☐ Low

My top 3 SOP priorities are:

1. _____
2. _____
3. _____

The 7-Question SOP Test

Before you consider an SOP complete, ask:

1. WHAT? What exactly is the process?
2. WHO? Who is responsible?
3. WHEN? When should the process begin?
4. HOW? What are the steps?
5. WHAT DO WE TELL THE CUSTOMER? What communication is required?
6. WHAT IF SOMETHING GOES WRONG? When should the issue be escalated?
7. WHAT DO WE RECORD? What information needs to be documented?

If your SOP cannot answer these questions, it probably isn't ready yet.

Your Action Plan

Don't try to create every SOP at once. This week: choose ONE process. Write down exactly how you currently handle it. Then ask:

"If I am not available tomorrow, can another person follow these instructions and give the customer the same quality of service?"

If the answer is no, you have found your first SOP.

My first SOP will be:

Person responsible:

Date to complete:

FINAL REMINDER

Your business should not depend on one person's memory to deliver a good customer experience. Good people need good processes. SOPs are not about making your business rigid — they are about creating enough structure for your team to know what to do, while still giving them room to treat customers like human beings.

Build the process. Train the people. Protect the experience.

About Ruby Hayford Consulting

Ruby Hayford Consulting helps businesses improve the way they serve customers, communicate, organise their operations and build practical systems for sustainable growth. With extensive experience in logistics and freight forwarding across Ghana and Africa, Ruby Hayford brings a practical, business-focused approach to Customer Experience, Communication and Administrative Excellence.

Need help turning your processes into SOPs? If this checklist has revealed gaps in your customer service, don't try to fix everything at once. Start with one process. Document it. Test it. Train your team. Improve it. Then move to the next. That's how you move from chaos to process.

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