CS-07 CALLS / E-MAIL / ON LINE APPS

**Purpose**

To define the process of answering/returning phone calls, emails and reviewing incoming online applications

**Policy**

Customer Service should provide a timely response to messages and on line applications. Customer Service staff should speak in person, on the phone, or in emails clearly and calmly, using empathy and kindness.

**Staff /Areas Affected**

• Customer Service Staff

**Definitions**

**CS** – Customer Service

**ShelterLuv** – Database used by HSWM for all tracking of customers, animals and associated service

**Responsibilities**

Customer service staff is responsible for answering phones, returning calls, and responding to emails that are sent to [adoptions@hswestmi.org](mailto:adoptions@hswestmi.org) or [admitting@hswestmi.org](mailto:admitting@hswestmi.org).

**Procedures – Phone calls and voice mail messages**

* When answering phones or returning messages, CS staff will be polite and as helpful as possible.  If unable to answer a question, the caller will be placed on hold while the CS staff finds the answer or transfers the caller to the appropriate person to answer the question.
* If the call is regarding the outcome of an animal they brought in, the call should be transferred to the Director of Animal Care or the Supervisor on duty.
* If someone calls about adopting an animal, CS may give general information about the animal but should encourage the caller to come in, complete an adoption survey and have a consult to meet the animal themselves.
* If someone calls to schedule an intake appointment, transfer to Admitting desk.
* If the call is an adopter who was not able to take the animal home at the time of adoption, do not give any time frame when the animal will be able to go home. Reiterate the fact that we will call once the animal can be picked up, and they will have up to 48 hours to pick up the animal after that call.
* Calls regarding heartworm treatment on an animal they adopted from HSWM, should be transferred to Vet Staff
* Contact another CS staff member or the Adoptions Manager for unusual circumstances.

**Procedures – E-mail**

* When replying to emails, CS staff will be polite and as helpful as possible. Responses are the same as those for phone calls and voice mail messages.
* Email messages should be reviewed and responded to as appropriate, prior to opening for the day whenever possible.
* Email should be checked ongoing through the business day and responded to as quickly as time permits.

**Procedures – On Line Adoption Applications**

* On line applications should be reviewed and handled prior to opening each day.
* Applications should be reviewed for any ‘red flags’ (Rejection) or or needing further information) that would prohibit adoptions from HSWM.
* Reviewing of On Line Applications does not take the place of a Consultation. Consultations will still be required even if accepted.
* Red Flags would include but are not limited to issues such as unaltered animals in the home, wanting the new animal as an ‘outside’ animal,
* Select the appropriate ShelterLuv options for processing:
  + Accept – Create Record and Email Applicant – or -
  + Mark In Process – an email should be sent to clarify information provided – or -
  + Reject - Reject but create person record
* If ‘Accept’ – an email will be sent to inform the person that we have received the application, but they must still come in to be ‘Approved’.
* If ‘Mark in Process’ – open email and copy the email address (or call if no email) to create a new email. Ask the applicant for clarification regarding the issues that may be ‘red flags’. Generally there is just a misunderstanding of our question, or their description in the answer . Once this has been resolved, proceed with Accept or Reject on the application in ShelterLuv
* If ‘Reject’ is selected an email will be sent stating their application is under review and they will need to email or call us for further discussion.
* Attributes and memos should be updated once the person who is Rejected has been created in ShelterLuv. Notes should be detailed as to the reason for rejections so if the applicant does follow up, they can be told specifically what the issue was that caused their application to be rejected.
* No other option should be selected when reviewing on line applications

**Procedures – Paging**

* Staff - overhead paging should only be done after every attempt has been used to contact a staff member by phone
* Volunteers – paging should be done only if a staff member cannot quickly locate the volunteer (Adoption Counselor, dog walker, etc.) in the lobby area, consult rooms, cattery or kennels.

**Revision History**

V1 - Created 1/11/16

V2 - Revised 11/2/18

V3 - Revised 10/17/19

V4 – Revised 4/26/21