Klarstig

Customer Service Policy Quiz

Use this short knowledge check to discuss sound working practices. Choose one answer for each scenario and explain how you would apply the guidance in your role.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Learner name or reference *

When instructions are unclear what should you do first *

- ☐ Assume the usual approach is acceptable
- ☐ Skip the task without telling anyone
- ☐ Ask the responsible person for clarification

What is the best way to document a completed task *

- ☐ Rely only on memory
- ☐ Record the result date and relevant evidence
- ☐ Mark complete before checking the result

Two copies of a policy show different instructions what should you use *

- ☐ Confirm the current approved version with its owner
- ☐ Choose whichever is easiest
- ☐ Use the oldest copy

A task seems to need an exception to policy what is the appropriate next step *

- ☐ Make an exception without a record
- ☐ Tell others the policy no longer applies
- ☐ Request the required review and approval before applying the exception

How will you apply these principles to your work *

Specific details

Policy name version and responsible team

Complete when relevant to this request.

How the policy applies and where exceptions must be reviewed

Operating context

Organization branch or team concerned

Complete when relevant to this request.

Local requirements and constraints relevant to this document

Team specific details

Customer service team queue or case reference

Complete when relevant to this request.

Response expectations escalation route and customer handover needs

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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