

SUPPORT STANDARD OPERATING PROCEDURE (SOP)

Daily Email Management

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1. Purpose

To ensure that incoming emails are reviewed, prioritized, organized, and answered professionally so that important messages receive timely attention.

2. Scope

This procedure covers reviewing the inbox, categorizing emails, drafting replies, tracking follow-ups, and maintaining an organized email inbox.

3. Procedure

Step 1: Review the Inbox

- Open the client's email inbox at the agreed start time.
- Review new and unread messages.
- Identify urgent requests, deadlines, and important client communications.

Step 2: Prioritize Emails

- **High Priority:** Urgent requests, deadlines, and time-sensitive issues.
- **Medium Priority:** Client inquiries and tasks requiring a response soon.
- **Low Priority:** Newsletters, general updates, and non-urgent information.

Step 3: Categorize Emails

- Apply appropriate labels or folders.

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- Separate emails that require a reply from those that need follow-up.
- Archive messages that no longer require immediate attention.

Step 4: Draft and Respond

- Prepare clear, polite, and professional email responses.
- Check spelling, grammar, names, and relevant details.
- Follow the client's communication preferences.
- Request approval before sending sensitive or high-impact messages when required.

Step 5: Track Follow-ups

- Record pending emails in the email tracking spreadsheet.
- Include the sender, subject, priority, status, and follow-up date.
- Review outstanding items to ensure nothing is overlooked.

Step 6: End-of-Day Review

- Check for unanswered high-priority emails.
- Update the tracking spreadsheet.
- Report urgent unresolved items and pending actions to the client.

4. Quality Checklist

- ☐ New emails reviewed
- ☐ Urgent messages identified
- ☐ Emails categorized correctly
- ☐ Replies checked for professionalism
- ☐ Follow-up dates recorded
- ☐ Pending issues reported to the client

5. Confidentiality

Keep client emails and attachments confidential. Use only authorized accounts and tools, follow the client's data-handling instructions, and never share private information with unauthorized people.