SOP: Handling a Client Website Change Request

Written by Benigno Bens Dagani · Based on the process I followed in Customer Success at a US website company (20+ client accounts) · No client names or data

Purpose

Make every change request accurate the first time, keep the client informed, and make sure nothing falls through the cracks while waiting on another team.

Trigger

A client asks for a website change by phone, chat or email.

Steps

1. **Confirm the right account.** Search the CRM by name, email *and* phone number. If one phone number has more than one account or website, ask the client which site they mean before doing anything.
2. **Confirm the exact request.** Restate it in one sentence ("You'd like the background image on the home page hero replaced with this photo, correct?"). If anything is vague (which page, which image, which text), ask.
3. **Log it.** Add a CRM note: date, request, site, and status "In progress".
4. **Check the restore point.** Before editing, confirm a dated restore point/backup exists so the change can be undone.
5. **Make the change** and check it on desktop and mobile.
6. **Can't do it yourself?** Escalate to the right team in the team channel with: account, site, request, screenshot. Tell the client: "I've sent this to our technical team and will update you by [time]."
7. **Follow up on schedule.** No reply after ~1 hour: follow up. No reply after a few hours: escalate to the team lead. Never let the promised update time pass without messaging the client.
8. **Close the loop.** Tell the client what was done (or why it can't be done, plus an alternative). Update the CRM note to "Done" or "Declined, reason".

Quick checklist

Check	Done
Correct account/site confirmed (checked for duplicates)	☐
Request restated and confirmed with client	☐
CRM note created	☐
Restore point exists	☐
Change checked on desktop + mobile	☐
Client given a specific update time (if escalated)	☐
Client informed + CRM status updated	☐

Why these steps exist (lessons learned)

- **Step 1** was added after a request arrived on one account when the client meant a second site under the same phone number. Checking for duplicates first prevents this.
- **Step 4**: when a client regretted his own edits, dated restore points let us bring the site back exactly as it was.
- **Step 7**: waiting a full day on another team taught me to escalate sooner and always give the client a specific update time.

> The same pattern works for any request in a CRM: confirm the record → confirm the ask → log it → act → follow up on a set schedule → close the loop.