## CUSTOMER SITE VISIT POLICY

[Organization Name] understands that our customers desire and anticipate superior service from us. We are committed to providing exceptional, courteous, and respectful customer service to our customers when we are on their premises, at all times. This policy will establish the standards for employee behaviour while on customer sites, and will adhere to the rules of all applicable legislation as well as our Code of Conduct policy.

POLICY

[Organization Name] representatives are expected to follow the rules and regulations of standard practice while visiting a customer site. A high level of professionalism is expected. Representatives of [Organization Name] are expected to conduct themselves in the same way they would in an office setting, and respect each customer and all other employees at the customer’s location.

Employees Responsibilities

* Be prepared ahead of time for the task or meeting at hand by taking the time to do your research and understand the customer’s needs and the reason for the site visit. For example:
	+ Learn who you will be meeting with and who should be included in addition to the contact person(s)
	+ Determine the exact location/office in the site, date, and duration of the visit.
	+ Prepare all necessary documents, questions, materials, technology etc.
	+ Send a reminder notice to the client regarding the date and time of visit
* Behave in a respectful and professional manner at times. This includes:
	+ Arriving at the site early to ensure you are on time
	+ Dressing appropriately for the job or meeting
	+ Greeting the customer in a professional and friendly manner and ensure interactions are polite and enhance the client relationship and experience
	+ Being mindful of the client’s time and space
	+ Communicate clearly and professionally. This includes fellow coworkers who accompany you to the site. Refrain from negative banter, swearing or horseplay or any other behaviour which would represent [Organization Name] in an unfavourable manner
	+ Paying close attention to the client and listening to them intently. Allow the client to speak freely and set the pace for any discussions. Observe non-verbal cues.
	+ Demonstrate an interest in the client’s objectives and ways in which [Organization Name] can improve service and add value to the relationship
	+ Do not overstay. Keep an eye out for any evident signs that it's time to depart
	+ Explicitly expressing gratitude for the client's time and business when you leave the site
	+ Clean up after yourself. The client should not know you have been there once the job is complete.
* Present the client with answers and solutions. Remember to review any key concerns that the customer raises, and assure them [Organization Name] will do its very best to address them. Follow up with the office if assistance is needed in providing solutions.
* Contact their supervisor or manager with any questions or concerns.

Health and Safety

The health and safety of our employees and our customers is of the utmost importance. Employees and supervisors will adhere to all health and safety protocols that are in place at all times. This includes the anti-harassment and violence policies that are in place.

Confidentiality

Employees are reminded that any customer information that is learned during the course of a site visit is to be maintained in strict confidence according to privacy laws and our policy.

Failure to Comply

Employees who do not adhere to the guidelines set forth in this policy may face disciplinary action up to and including termination of employment.