NORTHLINE STUDIO

Client Service Handbook

Northline Studio

This fictional operations handbook describes how a small creative studio handles client appointments, payments, requests and service incidents. It is the only source used in the Folio portfolio demo.

Where to look

Appointments and rescheduling: page 2. Cancellations and missed appointments: page 3. Refunds and payment methods: page 4. Complaint intake and escalation: page 5. Service interruptions: page 6. Accessibility: page 7. Project delivery: page 8. Information handling: page 9. Correcting invoices: page 10. Shift handover: page 11. Review and exceptions: page 12.

Using this handbook

Apply the specific procedure for the situation. If a procedure calls for approval or an exception, record the decision and the owner. The examples are fictional and contain no client records.

Appointments and rescheduling

Confirmed bookings

Clients may reschedule a confirmed appointment up to 24 hours before its scheduled start, subject to availability. Send rescheduling requests through the original booking channel. Use the appointment reference to match the request to the current reservation.

Replacement time

Offer up to two available replacement times and keep the original appointment until the client accepts one. Once accepted, confirm the new local date and time in writing and update the calendar before releasing the original slot.

Less than 24 hours

Route requests received less than 24 hours before the appointment to the duty lead. Staff must not promise a change until the duty lead confirms the exception. A studio-initiated service interruption follows the procedure on page 6.

Cancellations and missed appointments

Client cancellation

A client who cancels at least 24 hours before the appointment may request a refund of the booking deposit. Record the cancellation time and the original booking reference. Close the calendar slot only after sending written confirmation.

Late cancellation

For a client cancellation with less than 24 hours of notice, the booking deposit is normally retained. The duty lead may approve an exception and must record why the exception applies.

Missed appointment

Wait 15 minutes after the scheduled start before marking an appointment as missed. Send a brief message through the booking channel and explain how to request a new time. Do not label a studio-initiated cancellation as a missed appointment.

Refunds and payment methods

Approved refunds

Finance returns approved refunds to the original payment method within five business days of approval. The payment provider may take additional time to show the credit on a statement.

Refund records

Record the approval date, amount, booking reference and refund transaction reference. Send the customer the amount and the expected processing time after the refund has been submitted. A refund has not been submitted until a transaction reference is available.

Unavailable payment method

Escalate a failed refund to Finance. Staff must not request card numbers or promise a transfer to a different account. Finance confirms the next step directly through the contact channel already on record.

Complaints and escalation

Intake and acknowledgement

Acknowledge a written complaint within one business day. Record the complaint reference, contact preference, date received and the outcome the client is seeking. Confirm that the complaint was received and tell the client when the next update is due.

Escalation owner

Send complaints involving personal information or a disputed payment to the duty lead on the same business day. The duty lead assigns an owner and records whether Finance or the privacy contact needs to respond.

Follow-up

Provide a progress update within three business days of acknowledgement if the complaint remains open. Record the final outcome and send a written summary through the client's existing contact channel.

Studio service interruptions

First action

If the studio cannot deliver a confirmed appointment, inform the client through the original booking channel. Offer a replacement appointment or a full refund of the booking deposit. The client chooses the remedy.

Replacement and refunds

A studio-initiated change carries no rescheduling fee. If the client chooses a refund, the duty lead records approval and Finance follows the refund process on page 4.

Shared incident

When an interruption affects more than one booking, create a single incident reference and record each affected appointment under it. Notify the duty lead before promising a restoration time.

Accessibility requests

Collect the request

Ask clients what adjustment would help them take part in the appointment and record only the preference needed to fulfil that request. Offer a written summary of appointment information on request.

Advance notice

When possible, ask clients to request an adjustment two business days before the appointment. The two-business-day period is guidance. Staff must still consider requests received later and confirm what can be provided.

Confirm arrangements

Confirm the agreed arrangement in the booking channel. If the studio cannot provide the requested adjustment, offer a suitable alternative and ask the duty lead to help if the client cannot use it.

Project delivery and revisions

Review copy

Send one review copy with a clearly stated response deadline. Ask the client to return a single consolidated set of comments to the project contact, with the affected page or section identified.

Included revisions

The standard design package includes two rounds of revisions. A revision round starts when the client submits a consolidated set of comments. Confirm any additional fees in writing before starting a third round.

Final files

Deliver approved final files through the agreed delivery link within two business days of final written approval. Record the date that the link was sent and the names of the exported deliverables.

Handling client information

Collect and store

Collect only the contact details and service information needed for the booking or project. Save messages and files in the designated project workspace and restrict access to staff assigned to the work.

Close a project

Remove working files from shared review folders 30 calendar days after project closure. Keep the final deliverables and the associated approval record in the project archive under the studio retention schedule.

Accidental disclosure

Tell the duty lead immediately if client information is sent to the wrong recipient. Record what was sent, when it happened and who received it. Leave any notification to the assigned incident owner.

Invoice corrections

Common corrections

Finance handles changes to billing names, invoice references and amounts. Ask the client to identify the invoice number and requested change without sending payment credentials.

Paid invoices

If a paid invoice needs a change to its amount, Finance issues a credit note and a corrected invoice where applicable. Staff must not edit the amount on the original paid invoice.

Service target

Finance reviews invoice correction requests within two business days. When a correction is complete, send the corrected document through the original billing channel and retain the link to the original record.

Shift handover

Open work

Before the end of a shift, put unresolved booking changes, pending refund approvals and open complaints on the handover list. Include the reference, next action, due time and responsible person.

Urgent items

Speak directly to the incoming duty lead about items due before midday on the next business day. Confirm that the incoming lead has seen the record before ending the shift.

At the next shift

Review the handover list at opening. Reassign any item whose owner is unavailable, and update the client if the committed next contact time cannot be met.

Exceptions and review

Approve exceptions

The duty lead may approve a procedure exception when the handbook specifically permits one. Record the applicable rule, reason, approving role and time of approval. Escalate payment account changes to Finance.

Working days

A business day is Monday through Friday, excluding the studio's local public holidays. Count the first business day after the event as day one for processing targets. The studio uses local time when interpreting booking deadlines.

Review schedule

The operations coordinator reviews this handbook quarterly. Questions outside its procedures go to the duty lead. Document recurring exceptions so they can be considered during the next review.