Call flow at a glance

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Reader group: All agents

In a live knowledge base, only signed-in Hootline agents would see this page. It's public in this demo so you can explore.

Every call, for every client, follows the same six steps. Your client playbook fills in the details.

Step	What you do	Why it matters
1. Greet	Use the client greeting and your first name	Sets a confident, friendly tone
2. Verify	Confirm identity before discussing the account	Protects the customer and the client
3. Listen and confirm	Let them finish, then restate the issue in one sentence	Prevents solving the wrong problem
4. Resolve	Search the knowledge base; follow the playbook	Consistent answers, first time
5. Confirm and offer	Check it's fixed; ask "Is there anything else?"	Drives first contact resolution
6. Wrap up	Close warmly, add notes and a wrap-up code	The next agent sees the full story

Can't find the answer in 60 seconds? Place the customer on a short hold and ask in your team's help channel. Then leave a comment on the article you expected to find it in.