Hold, transfer and escalation

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Reader group: All agents

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Hold

- Ask first: "May I place you on a brief hold while I check that?"
- Check back every 60 seconds. Never leave a customer on hold more than 2 minutes without a check-in.
- Thank them when you return.

Warm transfers

1. Tell the customer who you're connecting them to and why.
2. Brief the receiving agent before you connect the customer, so they never have to repeat themselves.
3. Stay on the line until the introduction is done.

When to escalate to a supervisor

- The customer asks for a supervisor twice
- A credit or refund is above your approval limit (see your client's matrix)
- Legal threats, media mentions or a safety issue
- You suspect fraud