Nesting checklist

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Reader group: New agents

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

Nesting is your first two weeks on live calls with extra support. Your coach checks off each skill as you show it.

- Uses the correct greeting for your client
- Verifies identity on every call
- Finds the answer in the knowledge base in under 60 seconds
- Places holds and warm transfers correctly
- Applies the credit matrix without needing approval for standard cases
- Writes three-line notes and picks the right wrap-up code
- Handles one upset customer using the LAP method
- Takes a card payment following the PCI steps

Most agents graduate nesting in 8 to 10 shifts. There's no penalty for taking longer.