**HELP QUEUE INTERACTIONS on Call Center**

**We are all a part of Team Capital. All interactions should be a positive, educational experience and should be conducted in a supportive, non-judgmental manner. Always be considerate and respect one another.**

* **Standard checklist for ALL interactions**
  + *LEAD*
    - Identify name and X-ID. Whom am I speaking with and how can I help?
    - Provide clear, detailed instructions that are solution-based
    - Cite policy either immediately via call interaction or within 24 hours via email
  + *ESS*
    - Identify name and X-ID, option to indicate if new worker
    - Provide case #
    - Provide topic/question/concern - clearly and specifically
    - Provide policy citation(s) thus far
    - State whether or not caller is on hold
    - Follow up on case immediately or within 24 hours
    - Communicate “next steps” to caller, call back if necessary, case comment on all actions
* **Call Interaction soft skills**
  + *LEAD*
    - Participate in active listening
    - Communicate in a clear and concise manner
    - Maintain a helpful, positive attitude with a friendly tone that is non-judgmental
    - Treat every interaction as a teachable moment
    - Coach ESS in a manner that encourages independence and promotes self-confidence
    - Take ownership of the call/question(s) and always follow through
    - Offer 3-way call as a means of support
    - Ask “did I answer your question?” and “Is there anything else that I can help you with?”
    - End every interaction on a positive note, thank them for calling
  + *ESS*
    - Participate in active listening
    - Maintain a positive, friendly tone
    - Remain open-minded, willing to learn & grow
    - Avoid engaging multiple leads or “fishing” for answers
    - Ask clarifying questions if needed
    - End every interaction on a positive note, thank them for their time

**Escalated Calls**

**due to customer dissatisfaction**

***ESS***

→1 Assist customer the best that you can, according to policy. Practice de-escalation techniques.

→2 Remind customer of their rights, offer option of filing a fair hearing, and describe process.

→3 Call Help Queue lead as a last resort or when customer requests a supervisor.

→4 Brief lead on situation and complete a warm transfer through call center.

→5 Case comment on all actions taken.

***LEAD***

± In addition to 1 and 2 above, escalate to a supervisor when necessary.

± Case comment on all actions taken.