

## Escalation process

### Customer Immediately Asks For A Supervisor

If a customer is requesting to escalate at the start of the of the call, it is an expectation that you still attempt to assist this customer. Ask the customer for account information to give to your Team Lead or Supervisor. Once the account is brought up thank your customer and look at the notes to see if you can determine why they may be escalating.

If you have a customer who is escalating at the start of an interaction, you can use a phrase like: *“I apologize for any trouble that you are currently experiencing. Let’s first gain access to your account so that we can get the situation resolved for you!”*

If the customer refuses, explain that you want to make sure you understand why they are escalating so that you can get them in contact with the correct Supervisor.

Customer Service vs. Technical Support



## Customer Escalates

Ask permission to place your customer on hold so you can get a Lead to speak with them further.

### **Example statement:**

“May I place you on hold while I locate a Lead?”

If the customer agrees, reach out to your Lead.

### **What if the Leads are busy assisting customers?**

#### **Explain the situation, here is an example for you:**

*“My Leads are currently assisting other customers I can get one on the line for you if you don’t mind holding or I can have one of them call you back by the end of business today.”*

Always remember to **WARM** transfer the call.

- INI speed dial **237-KS**
- INI speed dial **261-CA**
- INI speed dial **164- IL / TX / PA**

**Never** cold transfer an escalation.

3/14/2017



## Transfer To A Lead



Lead will assist the customer:

***Advise the Lead that the call is an ESCALATION before any information is provided about the customer. Ex. “I have an escalation in transfer...”***

- Provide the member number / account name / name of the caller.
  - Restate the issue.
  - Advise what resolution you offered.
  - When the Lead is ready conference in the customer, introduce them to the Lead and then disconnect yourself from the call.
- Ex. phrase: “Thank you for your patience, I have my Lead Beverly on the line and I have explained your situation to her...”

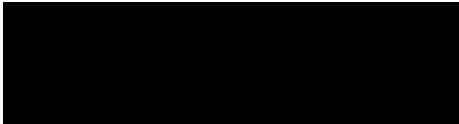
Do not stay on the line to listen to the resolution. If you want to know the outcome you can view the account notes at a later time or email the Lead to find out.

***\*\*Note: If your customer will not accept speaking to a Lead and demands to speak with a Supervisor move forward through the process. Never force a customer to speak with a Lead if they demand to speak with a Supervisor.\*\****

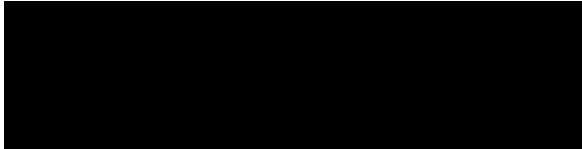
# Contacting a Supervisor

- The Lead will attempt to contact their Supervisor by Instant Message.
- If a Supervisor is not available, the Lead will offer a call back to the customer.

## East Supervisors:



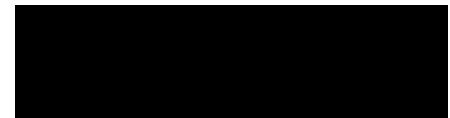
## Comm. Centers



## East Leads:



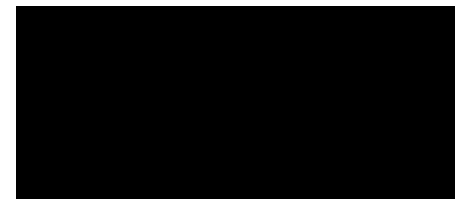
## West Supervisors:



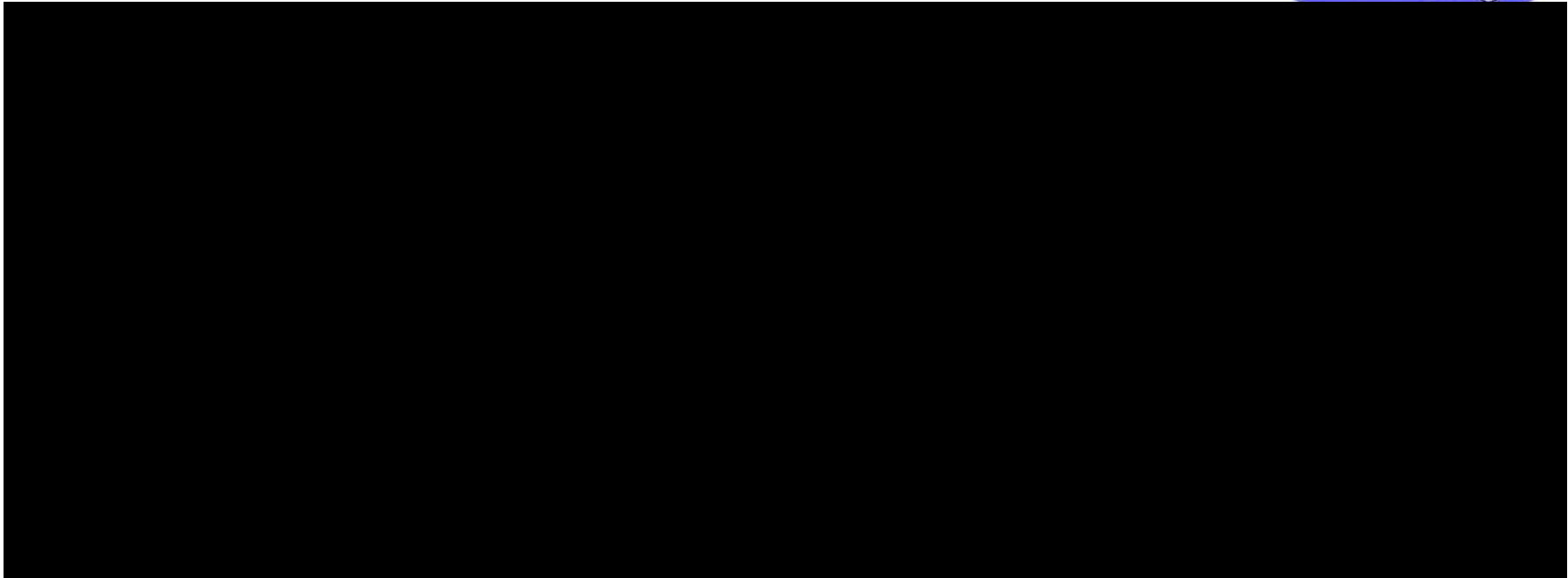
## Comm. Centers



## West Leads:



# Email Distributions



**Reminder:**  
***When you need to  
notify more than  
one Lead /  
Supervisor, use the  
distribution lists.***

## Submitting a Sharepoint Escalation



Apologize to the customer and explain that you will have a Supervisor call them back as soon as one becomes available. *Example: "I apologize, but unfortunately there aren't any Supervisors available at the moment. I can have someone call you back, but please be advised it can take up to 24 hours for them to return your call."*

### **Include in your Sharepoint Escalation:**

*Who called? Account number and good contact number as well as, note what transpired, the name of the caller, their call back number and their preferred time frame to receive a call back.*

*Ex. "John Smith is upset because he was billed for equipment. He was told it would be adjusted but it wasn't. He wants a call back ASAP. I reviewed account and show the charges are valid – notes do not indicate fees would be waived. Please do not call after 8pm. He is normally available between 8am-8pm. Contact #'s 936-555-5555 or 936-555-1234."*

**Prism Account:** *place a note on the account to track the interaction.*

*Ex. "John vfyd pin, wanted to speak to a Sup. but none avail. Sent email to Residential Management email. Advised John he will receive a cb within 24hrs."*

**\*A Supervisor will respond and call the customer within 24 hours.\***