

HOW TO WARM TRANSFER

1 SET EXPECTATIONS: Tell the customer you will place him on a brief hold to ensure the advisor is available.

→ **Three Ring Rule:** *Don't keep the customer on hold too long. If no one answers the phone after three rings, take the customer off hold.*

2 HOW CAN I HELP?: If the advisor is not available, ask the customer how you can assist.

3 SEND TO A MANAGER: If you are unable to help the customer, offer to connect him/her to a manager.

4 TAKE A MESSAGE: If you are unable to connect with a manager, after three rings, take down the customer's name, number and the reason that they called.

5 FOLLOW-UP: Thank the caller and assure that he/she will be followed up with.

