

# HOW TO WARM TRANSFER

1

**SET EXPECTATIONS:** Tell the customer you will place him on a brief hold to ensure the agent 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 agent 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.

