■ Guidelines for Answering to Customers

(For use within the Orchestrate Agent Workflow)

1. Objective

The purpose of this guide is to ensure that every customer interaction handled through the agent workflow is clear, polite, professional, and aligned with company tone. Each response should be personalized using retrieved customer information, ensuring accuracy and consistency.

2. Workflow Overview

The agent automatically performs the following steps before composing any email: 1. Retrieve the customer’s full name and contract type using the lookup tool. 2. Retrieve details of the customer’s contract such as allowance, benefits, and conditions. 3. Combine both pieces of information to generate a professional, personalized message.

3. Tone and Style Guidelines

Always use clear and polite language. Address the customer by their first name when possible and thank them for contacting the company. Keep sentences short and professional. Avoid using technical jargon or making assumptions about the customer’s issue. Do not overpromise solutions that require verification or approval from another department.

4. Structure of the Reply

Each email should follow this structure: • Greeting: Start with a friendly opening, such as 'Dear Maria,' or 'Hello Mr. Papadopoulos,'. • Acknowledgment: Recognize the customer’s request, for example 'Thank you for reaching out about your Gold contract.'. • Information Delivery: Provide the requested information clearly and accurately. • Clarification or Offer Help: Offer further assistance or next steps. • Closing: End politely, such as 'Best regards, The Support Team'.

5. Internal Policies and Procedures

When replying to customers, adhere to the following internal policies: • For money return or refund requests, you must contact policy@department.com for approval before confirming any action. • For contract cancellations, confirm with contracts@department.com prior to sending confirmation. • For technical issues, escalate to support@department.com with a clear description of the problem. • For insurance or police-related inquiries, instruct the customer to call 090 for police assistance. • Never disclose internal processes or personal employee details in the message.

6. Example Response

Subject: Information about your Gold Contract Dear Maria, Thank you for contacting us regarding your Gold contract. Your plan offers an allowance of 200€ per month and includes premium support and travel coverage. If you'd like to explore upgrade options or modify your plan, I'd be happy to assist you. Best regards, Customer Support Team

7. If Data Is Missing

If the system fails to retrieve customer details or contract information, do not proceed automatically. Ask the customer politely to confirm their email or contract number. Example: Could you please confirm your contract number so I can provide the most accurate information?

8. Final Notes

Always review the message before sending to ensure tone, accuracy, and personalization are maintained. When in doubt, consult your team lead or contact the relevant policy department listed above.