Expert Chat 2.0 – Warm Handover
At A Glance

📍 4 Steps for Warm Handover

| Inform the Customer	➡	Find an Expert	➡	Discuss the Issue	➡	Transfer the Interaction

Purpose

Warm Handover allows us to seamlessly manage the customer issue and provides the best opportunity to resolve in real time. It also demonstrates to the customer that we care and are empathetic to their needs and solving their issue quickly.

It is important to keep the customer informed during the handover process.

WORK INSTRUCTIONS, PROCESSES, SYSTEMS

Warm Handover (cont.)

To perform a Warm Handover, please follow the steps described here.
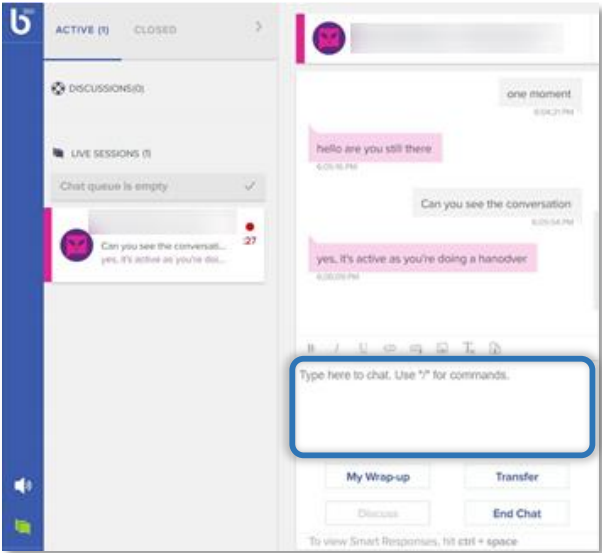

Step 1

Before looking for an expert to warm handover the interaction, the customer should be informed.

You can take advantage of the canned message **/ps-lookingforexpert** or add your own response:

"Your question belongs to another expert area. Let me check if someone is available."

Type **/ps-lookingforexpert** or your customized message in the chat window.

For warm handovers to CIC, the canned message **/ps-gotocic** can be used.
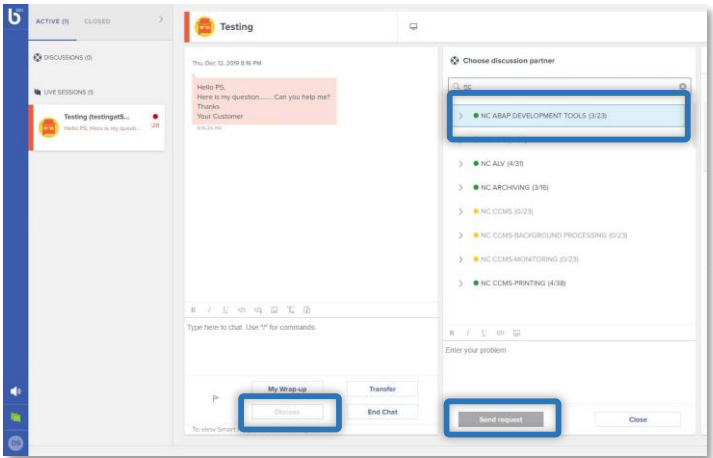
Step 2

After informing the customer about the warm handover process, it is necessary to find an Expert in the receiving area following the steps below:

Click the Discuss button, it will open the Choose discussion partner panel

Select the receiver Expert Chat queue

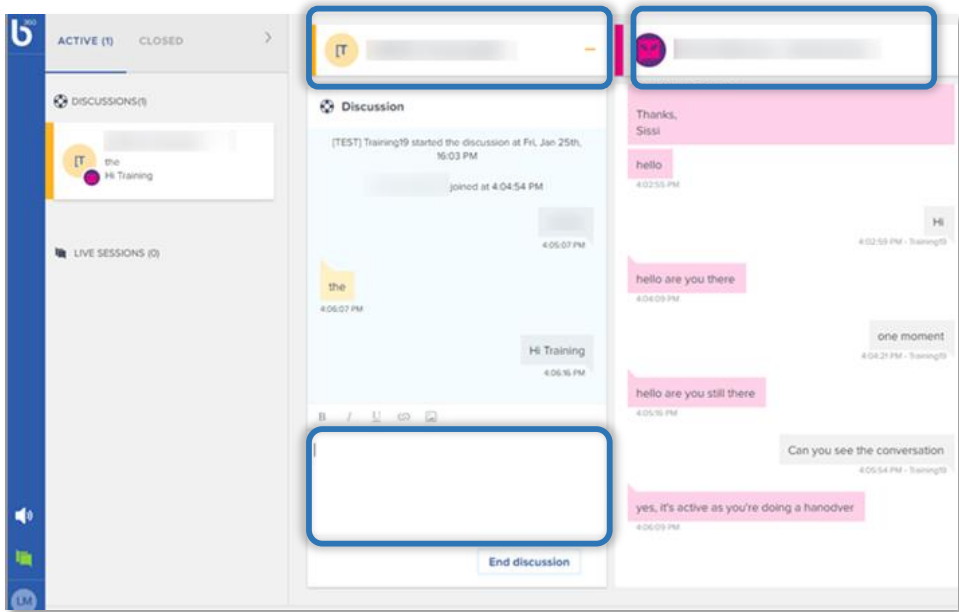Click the Send Request button

Notes ⚠

Do not inform the customer that you will forward the Interaction to another Expert, unless you already know that an Expert is available in the area.

Expert Chat 2.0 – Warm Handover

Warm Handover

**To perform a Warm Handover, please follow the steps described here.**

Step 3

On Bold360, there is a Discussion interaction, an embedded instant messaging functionality where you can discuss the issue before transferring the interaction.

The receiving engineer will see the Discussion displayed as a new Panel under Discussions. Click to accept.

As receiving engineer you can see the chat history with the customer.

You can discuss the issue with the sending Engineer before accepting the handover.
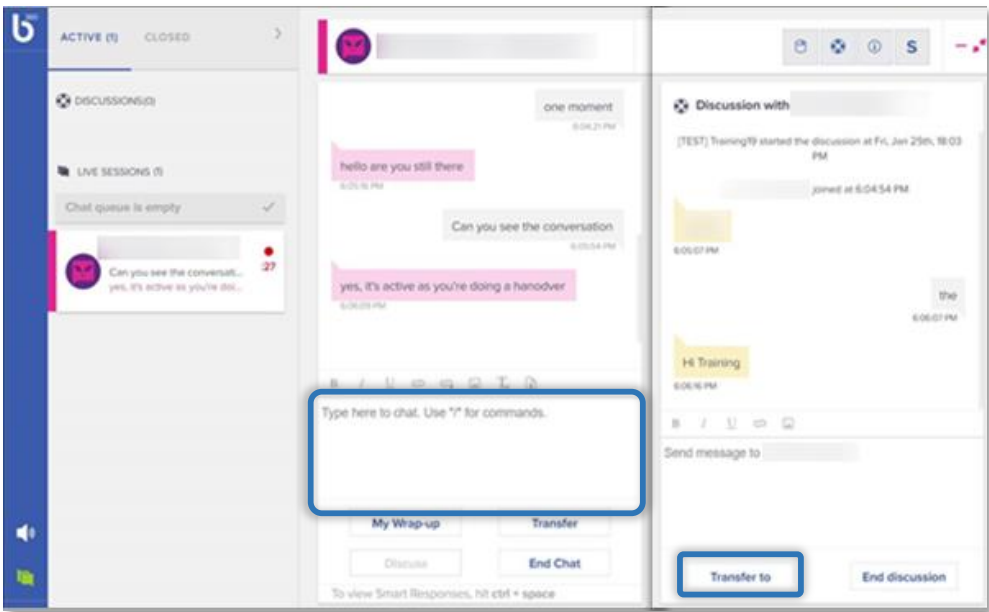
Step 4

After an acknowledgement from the receiving engineer that they will take the Chat, the interaction can be transferred.

Inform the customer that you will transfer the interaction to another Expert.

Click the Transfer to button in Discussion Panel to transfer the interaction to the receiving engineer.

The warm handover process is concluded now.

Notes ⚠️

The sending engineer must receive a confirmation of the area from the receiving engineer.

Change Log
Secondary title if needed

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Reilly, Ruth; Rodden, Stephen; Nagy, Janos; Sipocz, Eszter; Iturbe, Lucia; Maier, Bernd; Park, Jung In Kumar, Santhosh; Tang, Claire; Murray, Chris H	February 21, 2019	▪ New document for Bold360	Released
1.1.0	Melinda Ludanyi	May 6, 2019	▪ WIPS 4.0 Initial Document	Draft
1.1.1	Lisandro Magnus	November 22, 2019	▪ Document Template Update	Released