

FARMERS TRANSFER PROCEDURES

Effective immediately, please make sure to follow the “**Warm Conference Transfer**” procedure below...

1. Before placing the customer on hold inform the customer, "Sir/Ma'am I am going to go ahead and place you on a brief hold so I can get Consumer Solutions on the line to further assist you."
2. Place the caller on Hold
3. Dial Farmers
4. Wait for Farmers representative to answer
5. Provide the following to the Farmers representative:
 - a) Your name
 - b) That you are from CSG
 - c) Policy Number
 - d) Callers Name
 - e) Whether or not you verified caller's information (such as, DOB)
 - f) Brief reason for transfer
 - Example of Transfer Script of, *“Hello I’m Gina from CSG the policy number in reference to my transfer is XXXXXXXX.”... I have John Smith on the line and have verified their information... customer would like to cancel service and has not been able to reach his agent.”*
6. Ask for permission to transfer the caller
7. Press the Conference Button
8. Inform the customer that you have Consumer Solutions on the line, Introduce the Representative to the customer.
9. Hit "Transfer"

Important Notes:

**If the Consumer Solutions does not answer within 2 minutes place Consumer Solutions on hold and inform the customer you are still on hold for Consumer Solutions and set the correct expectation on the wait time and ask if the customer wishes to continue to wait. If so, inform the customer you will be transferring them over to put them in line to be answered. Thank the customer for calling farmers. Proceed to transfer the customer over to Consumer Solutions.*

**If you have an upset customer stay on the line and wait for Consumer Solutions to come on the line to explain what is going on, then conference the call and introduce the consumer solutions agent to the customer.*

**Please customize when transferring an Agent to Consumer Solutions, ASC Helpdesk, or other Helpdesks.*