# Being a Power House (Tips for Warm Conferencing/Transferring)

[Listen](#_Toc201223762)

[How to Place a Caller on a Brief Hold](#_Toc201223763)

[Provide Contact Information](#_Toc201223764)

[Keep It Warm](#_Toc201223765)

[Related Documents](#_Toc201223766)

**Description:**  Key points to Being a Power House when it is determined that a Warm Conference/Transfer is necessary to resolve the need.

|  |
| --- |
| Listen |

* A key aspect for Being a Power House, is to develop an Elevated ability to “Listen” and not just “Hear.”
* Difference between:

**“Hear”** (Auto Response, Hears with Ears)

**“Listen”** (Requires Focus, Listens with Heart)

* **Be prepared** for the incoming call:
* Electronic Notepad is ready to take notes.
* Previous member account notated and closed.
* No other distractions to focus and provide undivided attention.
* Empathy is a useful tool for Being a Power House and creating a connection.
* Tune into the tone and phrases that may indicate current mood to use de-escalation skills if needed.
* Listen to key words that will help you determine the appropriate department for the transfer.

**Examples:**

* Billing
* Prior Authorization
* Clinical
* Medical Foods
* Escalation

Examples of possible reasons to warm transfer and is not a complete list:

* Unable to access account – potential warm transfer to plan eligibility contact
* Not trained for the line of business or client – warm transfer to dedicated/specialized team
* Request is resolved in another department – warm transfer to Clinical or another department
* Specialty Account New Set up – warm transfer to Specialty Pharmacy
* Drug Recall detailed questions – warm transfer to Clinical

**Note:** Refer to [Phone Contacts (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad) to review the transfer destination contact information and the hours of operation

[Top of the Document](#_top)

|  |
| --- |
| How to Place a Caller on a Brief Hold |

Being a Power House and Placing on Hold:

* If any changes were made to the account, review the changes applied and provide Turn Around Time (TAT), if applicable

1. Notify the member that you are conferencing/transferring them to another colleague/department who is able to further assist them.
2. Ask if there is anything else that you can assist with before contacting the correct department.
3. Educate that there will be some hold time to reach out to the department, however; you will be checking back in until the connection is made. 
   * + Offer the choice if they would prefer to wait up to five minutes before you check in, or within every two minutes while they wait on hold.

 Do not allow the caller to hold for more than **five** minutes without checking in with them even if they have given you approval to keep them on hold longer.



**Note:** If the call escalates, refer to Senior Team.

**Additional Resource:**  [Compass - Five9 Agent Desktop Softphone with Compass (056045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f) or [PeopleSafe - Five9 Phone Agent Desktop (052326)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4819426-de56-4e8b-8caa-7f5d3a477e72)

[Top of the Document](#_top)

|  |
| --- |
| Provide Contact Information |

* Provide the name and phone number (do not provide internal numbers) of the department where the call will be transferred.

**Note:** This ensures that if the call were to get disconnected or dropped, the member would be able to call back into the proper area and to use it for future reference.

* Use this time to obtain a current phone number from the caller.

**Note:** If the call is dropped/disconnection, attempt at least one call back.

[Top of the Document](#_top)

|  |
| --- |
| Keep It Warm |

Continue to monitor the hold time to and keep the agreed upon time before checking in **(2 or 5 minutes).** Maintaining awareness and empathy for on-hold callers is important. If the caller wants you to check back, you should do so within approximately every two minutes. Callers on hold perceive their time to be much longer than actual time. Use Hold time in moderation as it usually leads to reduced customer satisfaction.

  After a total hold time of **five** (5) minutes, refer to Step 6 of [Compass - Basic Call Handling (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0). Look for scenario “Has a waiting time of **five**(5) minutes or longer.”

**Keep it warm** by continuing to address the caller by preferred title/name:

1. Thank them for holding and that you appreciate their patience.
2. Advise there is currently an extended wait time.
3. Reassure the caller that we are still waiting with them.
4. Ask for continued permission to hold and remind of other resolution options.

* If the wait becomes excessive, ask the member to continue to hold or ask if they would like to call back.

**Once the line is answered:**

1. Ask if this is the correct department that can assist with resolving the issue.
2. Provide a brief description of the reason for the call.
3. After authentication is complete and they are ready to take the call, introduce the caller to the receiving colleague and let them know that person is taking over the call.

**Tip:** This process ensures that everyone understands the reason for the call and saves time, so the members do not have to repeat themselves.

 Do **not** ask if anything else is needed.

4. State the ending call script.

1. Click **Leave Conference** for the call to disconnect your line from the conference call.

 Do **not** remain on the line, unless asked to stay on the call.



**Note:** This could be perceived as call avoidance as outline in: Service Excellence - Customer Experience Guidelines and Expectations (020070).

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

[Customer Care Abbreviations, Definitions and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

[Being A Customer Care Power House Index (008982)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7b0390db-a2ed-4307-b9c5-b842130225e9)

[Top of the Document](#_top)

Not to Be reproduced or Disclosed to Others without Prior Written Approval

**ELECTRONIC DATA = OFFICIAL VERSION / PAPER COPY = INFORMATIONAL ONLY**