

SME (Subject Matter Expert) chat and phone -- Expertise for teammates to help members

<h2>GUIDE.SUMMARY All Customer Support channels may receive support from Subject Matter Experts (SME's) via integrated chat in Communicator. This helps teammates provide members answers in realtime. </h2><h2>GUIDE.RELATED_LINKS

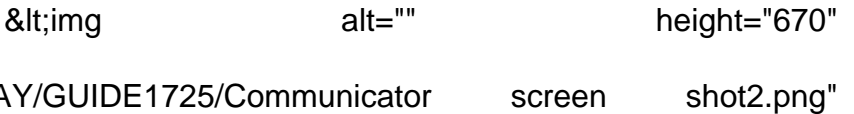
Holds (phone)
 GUIDE1487 - Escalation and Customer Experience Guidelines
 Holds (chat)
 GUIDE1651 -

Chat SOPs
 Transfers
 GUIDE1540 - How to Use Communicator Overview

<h2><h2>GUIDE.DETAILED_INFORMATION Teammates: Will keep full ownership of the customer interaction Are expected to use all available resources before using the SME chat. Examples: CSKB Guides Comms packs Tools - Unify or Agent Desktop Customer Help Pages Help hub/community Teammates should not tell customers that they are chatting with a SME as this encourages the customer to want to talk to the SME directly. Simply say you need a moment to investigate their issue. A SME provides: Chat support only after all resources and troubleshooting attempts have been utilized by the teammate Helps with de-escalating contacts by providing general guidance and additional talking point Answers teammate's question (to relay to member) Offer tips and tricks on tools/research Provides clarity about recent changes Use their experience to help with tailoring resolutions for members Ensures teammate is confident on delivering the resolution & educating the member A SME does not: Create and

open bug tickets - Follow the current bug process Take escalations - Use the current process to speak to a Team Leader or Supervisor Process or approve credit requests - Follow the credit policy Issue Coupons/vouchers Remove restrictions or process appeals - including removal of selling restrictions, holds, and suspensions

How to contact chat SME support: Gather all the information from the customer. (See Step 6). Only place the customer on hold if you need time to research or hear back from a SME. You may be able to talk with the customer while you provide information to the SME. Click the Chat Support icon in Communicator.

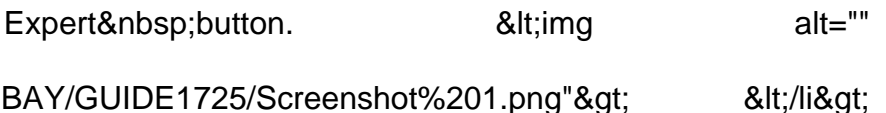
A screenshot of the Communicator interface. It shows a chat window with a list of chat support icons on the left and a main chat area on the right. The chat area displays a message from a customer and a response from a SME. The chat window is titled 'Communicator' and has a search bar at the top.

A second window will open. Select the relevant CCR values. Note: Its important that you choose the right CCR classification as it will
ensure your question is routed to the correct SME group.

Add notes. OJT class (if in OJT): ASAC: Case ID(s): Order ID(s):

Click connect. Wait for the next available SME. If the customer is on hold, check in at least every two minutes. Make sure that you fully understand the SME's answer before ending the chat. If SME chat is not available, or the wait time is longer than two minutes: Let the customer know you're still looking into it. Offer a call back.

How to contact phone SME support: CAUTION: NEVER transfer a contact to a SME, you should ONLY consult with a SME to help resolve the member's concern On an inbound or outbound call click the existing Expert
button.

A screenshot of the Expert button tooltip. It shows a button labeled 'Expert' with a tooltip that says 'Expert Help'.

When cursor hovers over help button, tool tip will appear indicating it is Expert Help
button. The Expert connect screen will load where either Expert Phone

or Expert Chat can be selected.
By clicking on Expert Phone the tab / button will turn blue to indicate it is activated.

Let member know they will be put on hold. Choose CCR classification of the Expert group to connect with. Enter a note in the Notes field.
Both of these steps will activate the Connect button. Click the Connect button.
Member will be put on hold; they can be taken off hold by clicking the hold button.
There will be wait time until the SME / Expert teammate connects.
When SME / Expert teammate connects, the knowledge transfer can take place.
Teammates will have the ability to toggle between member and SME teammate (hold / un-hold each party). When a teammate wants to disconnect the SME they can use the remove party button. From there, teammate can end the member call via standard SOP.
 Teammates working Email and Phone/Chat Channels: If you have are working an email and contact a SME for support and during your SME interaction you receive a member contact from a live channel (phone or chat interrupts email), follow the steps below: Let SME know you received a live member contact: I just received a phone/chat from a member I need to disconnect. Thank you. Disconnect from the SME If after you resolve the live contact, you still need assistance from a SME,

you can reinitiate a SME interaction. Best practices for working with a SME:

- Write clear notes. Use SME Support once per contact. Please make sure that you fully understand the answer from the SME POC before ending the chat / call. There should never be a reason for you to open up a SME more than once, on the same contact. Greet SME. Provide additional context (if required). Engage and check-in with customer. Never "shop" for a "preferred" SME. Thank SME for their time and support.

GUIDE.INSTRUCTIONSSTEPS_TO_RESOLVE Opening and closing spiels for

SMEs Opening: "Thank you for contacting the SME Support Chat, my name is _____. Please stay connected while I review your question."

 Closing: "I am glad I was able to assist you today. Thank you for contacting the SME Support Chat and have a great rest of your day!"

 Idle time SOP Idle time is when you are waiting on a Teammate to respond When a Teammate is unresponsive in the SME chat, we should only wait for a total of 4 minutes of idle time (checking in at 2 minute intervals): After 2 minutes: "Hi (name), just checking youre with me?" After 4 minutes (total):

 "I havent heard from you so Im going to end this chat" "If you still require assistance, please dont hesitate to contact us again" End the chat

 These are the scenarios in which the idle time SOP applies:

Teammate connects on chat but is unresponsive from the beginning

Follow prompt guidelines and then advise the teammate that you are ending the chat If you can resolve the query from the Teammates opening note, please do

so Then email them the resolution to avoid a re-contact

 Teammate becomes unresponsive during the chat and the Teammate is not seen to be typing after your 4 minutes of prompting End the chat

 Teammate has been quick to type messages and to respond throughout the chat and is then seen to be typing for longer than 2 minute You should initiate the prompt process If no response to this, you should end the chat as Teammate may have left a letter in type box Teammate has been slow to respond throughout the chat and is typing Adapt to your teammate before prompting, but be aware of idle time If no response to prompts, end the chat EXCEPTION:Teammate has signaled their goodbyes, or thank you, and the issue has been resolved Provide your closing and immediately wrap up the chat The reason for this is that some Teammates leave the chat unattended and mistakenly leave it open Timer process in Communicator Communicator shows how long a Teammate has been idle by the counter at the bottom of your chat window: The timer will automatically reset each time the member responds to you These timers will only reset if the teammate responds After sending your first prompt to the teammate at 02:00 of the member being idle, you will receive a notification at 01:50 of the member being idle This should alert you to end the chat with your second prompt: