Escalation and customer experience guidelines

<h2>GUIDE.RELATED_LINKS Related Links <ul> Holds (phone) GUIDE1487 - Escalation and Customer Experience Guidelines   Holds (chat) GUIDE1651 - Chat SOPs   Transfers <ul> GUIDE1540 - How to Use Communicator Overview   </h2><h2>GUIDE.DETAILED_INFORMATION Procedure/Policy <h3>General guidance</h3> The majority of the time, you should be able to handle customer contacts without escalating to a team leader. However, some customers may request to speak to a team leader or manager or supervisor. When they do, apply the guidelines below. You must also take clear documentation notes at all times. If a team leader is unable to satisfactorily resolve your customer's issue, or your customer requests to speak to a higher level of management, the team leader can arrange for a callback with that leader at a time that is suitable to your customer. In this instance the escalation may progress up the chain of command again, if necessary. Team leaders should follow the callback guidelines detailed below.   When you're the individual who takes an escalated contact, you are responsible for maintaining ownership and contact with your customer at all times until resolution. You must document all of your attempts to reach your customer as well as any conversations with your customer. Your notes should be documented clearly on the account so that they are easily understood by others.   <h3>Informal and/or formal communication</h3> Informal and/or formal communication <ul> We encourage you to communicate informally with your teammates as you attempt to de-escalate. Your informal communication might be with subject matter experts (SMEs) at the 1st or 2nd level of support, depending on how your LOB is set up and whether you're a new teammate. The preferred method of informal communication is Lync/Skype for business. The preferred method of formal communication is your CS Tool (Communicator, Unify-Siebel, or Unify-AD). This is because we can track that communication to the service request (SR), although it is recognized that chat is not available for some LOBs. In each case, determine the most appropriate method of communication (informal and / or formal) based on whether it's important to link the communication to the SR. Team leader escalations callback guidelines (Note: these guidelines apply to any customer of the leadership team attempting the callback) A callback should happen as quickly as possible, and within 24 hours of the original call. A callback should be done through our internal tools to ensure that the account has been documented with our attempt to reach the customer. A Team Lead making a callback should attempt to reach the customer 1 time. When the escalation happens at the end of the shift: <ul> If within calling hours: another member of the leadership team must attempt to reach the customer. If outside calling hours: attempt the callback the next day, within established calling hours.   Before closing out the SR, document the resolution you were going to provide the customer.   A teammate should always seek a customer's permission before placing a customer on hold Using alternatives to Hold Procedure &nbsp; Best Practice is to keep the customer engaged throughout the call, talking the customer through your investigation or asking the customer if they are ok to stay on the line while you are investigating their query. Avoid long silences by checking in regularly or walking the customer&nbsp;through what you are doing. This helps you create a partnership with the customer. Phrases for keeping a customer engaged&nbsp;on the call/chat: Lets have a look at this to see what the issue is. Okay I am just having a look into this for you, thank you for your patience. I will still be present while I check this issue for you please bear with me. I am going to keep you on the line while I research that feedback record for you. Thank you for your patience, this will just take another moment. Let's walk through this together. Phrases to avoid using: I am going to be silent while I investigate this for you. Yes, I am still here (If a customer has to ask are you still there you are not engaging enough with the customer). Phone: <ul> A customer should never be on hold for longer than two minutes without checking back to let the customer know they've not been forgotten. And if a customer is out of time, we should call back at their convenience. If a teammate needs to check back with a customer more than twice or the hold time is likely to become excessive during the call duration (5min+) the teammate should ask the customer if they would like to stay on the line while they continue to resolve their concern OR Have the teammate call the customer back at their convenience whilst they seek resolution   To ensure professionalism the appropriate hold button (not mute) should always be used. Teammates should always use the hold button on Communicator and not the AVAYA phone. Always thank the customer when coming out of the hold ("thanks for your patience" or similar statement). Hold time should only be used when a teammate needs to consult for support or leave their desk. Placed "On Hold" by customer PHONE / CHAT <ul> If a teammate is asked to Hold by a customer inform the customer that you will be "happy to hold for a few moments". Based on the situation (customer checking information in the account, getting their credit card, etc.) a teammate should wait for the customer to come back on line. If the hold is longer than 10 mins, teammate can end the contact. This is considered a disconnected contact, therefore a teammate is expected to make a call back attempt. If, however, you are put on hold for something not related to the call (customer needs to answer the door, take another call), a teammate should wait a maximum of 4 minutes (240 seconds) before releasing the Chat / Call and documenting a clear note on the account. This is considered a disconnected contact, therefore a teammate is expected to make a call back attempt. Chats are handled via the Chat SOP. <h3>De-escalation</h3> Current Opportunities for De-Escalation <ul> Incorrect information Lack of acknowledgment Monotone or robotic responses Customer does not feel valued Not actively listening Delivering a difficult message Explaining the why and not simply the what Techniques to Remember for De-Escalation The Beginner Mindset: <ul> Let go of being an expert! Never assume Actively listen Think without shoulds Complete and appropriate researchComposure: Do not avoid conflict as a result of fear Use fears, concerns, or worries to inform you of how to resolve the issue Avoid becoming defensive or taking things personally Voice Mastery: <ul> Use the appropriate tone of voice throughout the call, starting with the greeting If possible, using your own verbiage and matching your customers phrasing will make this feel less "scripted" to the customer. Avoid sounding monotone or robotic Express genuine interest and engagement when speaking with the customer Active Listening: <ul> Confirm: Give verbal confirmation to the customer Clarify: Ask questions to confirm your understanding if you are not sure Paraphrase: Reiterate what the customer is saying and confirm key points Summarize: Give a summary of the customers main points to conclude the conversation Empathize: Show appropriate empathy Ask the Right Questions: <ul> Remember the appropriate time and use of Open vs. Closed questions Remember to use probing questions to gather more information when needed Positive Positioning: <ul> Use positive language to help the customer feel good, especially when delivering a difficult message Focus on what can be done, not what cant be done Remember the difference between a service no and a hard no   Samples & Example Phrasing: To de-escalate an escalated customer: <ul> "Yes, there is a supervisor you can speak with within the next (appropriate number of hours) business hours. (This will likely differ based on your line of business). I just first wanted to try to be a partner with you. I can confidently tell you that I understand the situation and its nuances." "eBay is unique in that agents have been equally as empowered for handling these types of situations as a supervisor. I can explain exactly what options we have to move toward the most effective resolution for you and your business." "Absolutely, I can get you over to a supervisor to speak about your situation. However, I really wanted another chance to be your advocate today. This is something I am very familiar with and can confidently explain best practices, next steps and even some possible outcomes." "In an effort to have total respect for your time, I would love to help you get this addressed right now."
 To express empathy: <ul> "I recognize the frustration this has caused you and can understand how speaking with a supervisor might feel like the best option. However, I am confident we can work toward a resolution together." "I am happy to help you today. I can see how dealing with (paraphrase issue) can be stressful, and I am very familiar with this issue. I would love the opportunity to brainstorm with you best practices and effective next steps that will work for you and your business." "I'll be happy to help you with (paraphrase issue). I understand how (paraphrase issue) can be difficult to resolve and create stress and frustration." "I've found success if certain steps are taken. Would you be willing to go through these established best practices with me?"
 Trust building <ul> "I am familiar with this type of issue, I'm confident we can work toward a resolution together. I handle this type of issue almost on a daily basis. Not only am I an expert with this issue, but I'm also confident we can partner together to find a resolution." "(Customer name), I'm glad you've called today. Let's work together to get your issue resolved." "(Customer name), I'm glad you've called today and reached me specifically. This is an issue I handle very often and am familiar with a number of options to resolve this. Id like to be your advocate today as we work together to get your issue resolved."
 Making a commitment <ul> "(Customer's name), here is what I can do. (Explain your course of action)." "(Customer's name), I see this type of situation often and can absolutely see how this is frustrating." "I would really like the opportunity to fully explain our process and any alternative options to what you are requesting." "Here are a few of our options for this situation. (Explain your course of action)" "Here are the steps we need to take to resolve this issue. (Paraphrase required customer action &amp; Paraphrase your action)"
 &nbsp; <h3>SLS escalations</h3> General Information CAUTION

 *** IF YOU HAVENT RECEIVED TRAINING FOR THE SLS ESCALATION PROCESS, PLEASE CONTINUE TO USE YOUR CURRENT ESCALATION FLOW. ***

 If you are working in Buy, Sell or M2M you should only transfer relevant escalations to Buy, Sell M2M SLS. You should never transfer directly to another line of business second level support.

 Summary

 Weve created a consistent and technical solution for teammates to escalate a contact to a customer of leadership at the customers request.&nbsp; This enables teammates to provide a standardized experience to customers in real time.

 In case a teammate gets an escalation after 10 p.m.during the week or after 6 p.m.during the weekend they should follow the call-back SOP.

 Detailed Information

 Teammates: <ul> Are expected to use all available resources on every call to minimize escalations due to any misunderstanding or gap in knowledge or research: <ul> CSKB Guides Comms packs Tools - Unify or Agent Desktop Customer Help Pages Help hub/community Contact SME (GUIDE1725)   Will always attempt a second time to resolve the customers issue (de-escalate) acknowledging the customers request Will follow the new Payments Virtual Support process if your customer asks to speak or chat with a customer of leadership a second time Will continue to follow the normal escalation process outlined in GUIDE1731 - Fundamental Services Policies (FSP) for Customer Service for the following escalation reason: <ul> Abusive Customers   Will continue to follow the normal escalation process outlined in GUIDE1799 for the following escalation reasons: <ul> Media Inquiries Legal Threats   Will continue to follow the normal escalation process outlined in GUIDE1820 for the following escalation reasons: <ul> Bomb Threats (threats of physical harm) Suicide Threats   How to escalate a contact to Second Level Support (SLS) via phone Before we transfer to Second Level Support, we should always attempt one more time to de-escalate the call.

 However, it may not be possible to de-escalate a contact and the customer may ask to speak to your lead, supervisor, or manager a second time.

 REMINDER: Second Level Support is ONLY for escalations when the customer has specifically asked to speak with a leader. It should NEVER be used as a resource to ask questions or seek subject matter expertise. Please use the SME process for asking questions.

 If you are unable to de-escalate the call and the customer has requested to speak to a customer of leadership for a second time, you will then need to Warm Transfer the customer to Second Level Support using Communicator.

 Inform the customer that you will place them on hold, setting expectations for hold time, and that you need to reach out to a "member of the leadership team" to provide them the interaction details Place the customer on hold Mark the Service Request as Escalated Click on the Conference button to begin a Warm Transfer to SLS Select the "SLS" tab Select the correct CCR Add Notes <ul> OJT class (if in OJT): ASAC: Case ID(s): Order ID(s): Did you contact SME before escalating? Why is the customer escalating?   Inform the customer of the wait time (If applicable) If there is a wait time or the hold is nearing 2 minutes, follow standard hold SOP and check in with the customer Click Transfer to SLS Once the Second Level Support is on the line, inform them of the reason for the escalation Once the Second Level Support teammate has the necessary information, bring the customer back on the line Complete the warm transfer immediately and go back to available. Do not stay on the line with SLS and the customer Supporting Screenshots <ol> Place the customer on hold:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2237_LIVE/PlaceCustomerOnHold_HowToEscalateSLS.png"> Mark as Escalated and Begin the Warm Transfer:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2237_LIVE/MarkAsEscalatedBeginWarmTransfer_HowToEscalateSLS.png"> Select the SLS tab Select the appropriate CCR Enter notes Review the EWT in brackets next to the CCR Click Transfer to SLS
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2237_LIVE/Steps3through7_HowToEscalateSLS.png"> Callback Requests Occasionally, an escalation request may require a callback from a member of leadership. Below are some examples when a customer may request a callback: <ul> If there is a wait time for SLS and, after informing the customer of the wait time, they ask for a callback instead If the customer wishes to escalate but would prefer a callback at a later time instead of being transferred real time If after waiting for SLS and checking in with the customer on hold every 2 minutes, the customer requests a callback instead of continuing to wait Starting October 30th, 2023: If after 7pm MST, a callback will be required for SLS Phone contacts. SLS Phones will not be available to take contacts during this time. Talking points: I will need to set up a callback for a member of leadership to call you. You can expect a callback within the next 24 hours.
 What expectation should I set with the customer? Call back will be completed within a maximum of 2 business days. Tell the customer that we will do our best to accommodate any specific time they request however SLS cannot guarantee that specific time. In general, we will always try to call back as soon as possible.
 If a customer asks to speak to a supervisor twice and a callback is required: <ol> Access the Escalation Callback Form. Fill in the required fields. Submit the Callback Request. NOTE: Please do not send an Offline SR to SLS. The Callback Form submission is sufficient. How to escalate a contact to Second Level Support (SLS) via chat Steps for opening a chat <ol> Choose the transfer button from the bottom action bar:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2237_LIVE/chatStep_1.png"> Select the SLS tab, enter notes*, choose CCR and click Transfer to SLS when the button is activated (blue color).
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2237_LIVE/chatStep_2.jpg"> *Use the below questions as a template for your notes: <ul> Reason for escalation?   What was the tone of the conversation? Angry, sad, polite?   Did something specific trigger the escalation?   Are there any risks?   E.g.: Harm, account closure   What resolution(s) have been offered already?   What questions/issues does the customer still have?   <ol start="3"> The interaction will then disappear and teammates that sent the SLS transfer can move on to the next interaction.   When the receiver of the SLS interaction gets the chat assigned, it will look just like any other chat, they will need to look at the Notes section. Anything that the sending teammate entered in notes during the transfer will appear there.
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2237_LIVE/chatStep_3.jpg">   E-mail escalation SOP If a customer requests to speak to a supervisor in the email, follow the steps below: <ol> Inform the customer that they will receive a callback from a member of leadership within the next 24 hours Select the Send to SLS offline escalation option Enter the following details in the notes section: Customer name and User ID Confirmed phone number Specific date and time (only if requested do not offer) Reason for escalation What resolution(s) have been offered already? What questions/issues does the customer still have? Any other additional information you think SLS will need to prepare for the callback <ol start="4"> Select Send. Double Escalation SOP - Second Level Support Team ONLY If the customer is already speaking to a SLS team customer and is requesting to speak to another SLS team customer: <ul> Ask the customer, Would you like to speak to another SLS team customer because you are not satisfied with the resolution or are you wanting provide feedback on the service I offered to you today? If the customer is not satisfied with the resolution provided: <ul> SLS will inform the customer that they are talking to someone from the leadership/escalation team already and he/she wants to help the customer. The SLS will keep ownership of the escalation and give final outcome of the issue even if customer wants to continue to escalate <ul> Talking points I understand that youre frustrated but I want to reassure you that youre talking to a customer of the team that is the highest point of escalation already. I am confident that you are being provided with the most accurate and appropriate resolution for your concern.   If the customer is requesting to provide feedback on the service, the SLS TM 1 offered <ul> SLS TM1 will do a warm transfer to another SLS TM 2 within the same team/queue SLS TM 2 completes a warm transfer with SLS TM1(when possible) and takes over the contact SLS TM 2 will give final outcome of the issue and keeps ownership even if customer wants to continue to escalate   Other Resources <ol> First, read the important information below. Then click these links for phone, email or chat guidelines. You can also jump to the Talking Points for phone and chat. The majority of the time, you should be able to handle customer contacts without escalating to a team leader. However, some customers may request to speak to a team leader or manager or supervisor. When they do, apply the guidelines below. You must also take clear documentation notes at all times. If a team leader is unable to satisfactorily resolve your customer's issue, or your customer requests to speak to a higher level of management, the team leader can arrange for a callback with that leader at a time that is suitable to your customer. In this instance the escalation may progress up the chain of command again, if necessary. Team leaders should follow the callback guidelines detailed below.   When you're the individual who takes an escalated contact, you are responsible for maintaining ownership and contact with your customer at all times until resolution. You must document all of your attempts to reach your customer as well as any conversations with your customer. Your notes should be documented clearly on the account so that they are easily understood by others.   Informal and/or formal communication <ul> We encourage you to communicate informally with your teammates as you attempt to de-escalate. Your informal communication might be with subject matter experts (SMEs) at the 1st or 2nd level of support, depending on how your LOB is set up and whether you're a new teammate. The preferred method of informal communication is Lync/Skype for business. The preferred method of formal communication is your CS Tool (Communicator, Unify-Siebel, or Unify-AD). This is because we can track that communication to the service request (SR), although it is recognized that chat is not available for some LOBs. In each case, determine the most appropriate method of communication (informal and / or formal) based on whether it's important to link the communication to the SR. Team leader escalations callback guidelines (Note: these guidelines apply to any customer of the leadership team attempting the callback) A callback should happen as quickly as possible, and within 24 hours of the original call. A callback should be done through our internal tools to ensure that the account has been documented with our attempt to reach the customer. A Team Lead making a callback should attempt to reach the customer 1 time. When the escalation happens at the end of the shift: <ul> If within calling hours: another member of the leadership team must attempt to reach the customer. If outside calling hours: attempt the callback the next day, within established calling hours.   Before closing out the SR, document the resolution you were going to provide the customer. <h3>Payments Virtual Support</h3> General Information: CAUTION *** IF YOU HAVENT RECEIVED TRAINING FOR PAYMENTS VIRTUAL SUPPORT, PLEASE CONTINUE TO USE YOUR CURRENT ESCALATION FLOW. ***

 If you are in Payments you should only transfer relevant escalations to Payments SLS. You should not transfer directly to another line of business second level support.

 Summary

 We have created a consistent and technical solution for teammates to escalate a contact to a member of leadership at the customers request. This enables teammates to provide a standardized experience to customers in real time. This technical solution also enables the ability to receive subject matter support from the

Payments Virtual Support (PVS) team on a subset of payments topic. This helps teammates provide members answers in realtime.

 Detailed Information

 Teammates: <ul> Are expected to use all available resources on every call to minimize escalations due to any misunderstanding or gap in knowledge or research: CSKB Guides Comms packs Tools - Unify or Agent Desktop Customer Help Pages Help hub/community Will always attempt a 2nd time to resolve the customers issue (de-escalate) acknowledging the customers request Will follow the new Payments Virtual Support process if your customer asks to speak or chat with a member of leadership a 2nd time Will continue to follow the normal escalation process outlined in GUIDE1731 - Fundamental Services Policies (FSP) for Customer Service for the following escalation reason: <ul> Abusive Customers   Will continue to follow the normal escalation process outlined in GUIDE1799 for the following escalation reasons: <ul> Media Inquiries Legal Threats   Will continue to follow the normal escalation process outlined in GUIDE1820 for the following escalation reasons: <ul> Bomb Threats (threats of physical harm) Suicide Threats   Payments Virtual Support provides: <ul> Support only after all resources and troubleshooting attempts have been utilized by the teammate Answers teammate's question (to relay to customer) Payments Virtual Support does not: <ul> Create and open bug tickets - Follow the current bug process Answer general payments questions - Unless specifically called out as a use case please do not contact Payments Virtual

Support and continue to use your available resources to help answer the customer queries 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 Before contacting Payments Virtual Support Before we contact Payments Virtual Support to request help on an allowed use case, we should always ensure we have done a thorough search using our resources to find the appropriate answer for the customer.

 There are a number of scenarios in which you can seek help from the Payments Virtual Support team.

 For the following topics use the SME consult option to reach Payments Virtual Support: <ul> Payout Blocks - KYC Related Document Reviews (Partner) Payout Reversals Bank Re-Entry Unsuspending Failed KYC Accounts Payment Dispute Appeals ARN / BRN Low ASP promotion in UK - Opt in / Opt Out Requests 2+ Contacts to GCX to remedy the same issue (7 days) Request Bank Transfer Letter (Refer to the specifics in GUIDE1754) Escalations For the following use the SLS option to initiate warm transfer to Payments Virtual Support: Payout Blocks - KYC Related

 The Payments Virtual Support team will help in circumstances where an account has their payouts blocked due to KYC issues. Before contacting Payments Virtual Support, teammates should ensure that the payouts are blocked at an account level rather than just payout blocks related to risk or dispute holds.

 If an account has repeatedly failed at remedying their KYC issue and front office teammates cannot see a clear reason as to why they are continually failing they should contact Payments Virtual Support for further assistance, as it may require the request of a manual review by our payment processor which Payments Virtual Support can help facilitate. This would include scenarios where a customer requires a banner to be added to their account in order to proceed in remedying their KYC status.

 Front Office teammates must also file a bug ticket as all banners should be added automatically when customers are required to remediate.

 There are also occasions where Payments Virtual Support can help when an account has run into an issue regarding Letter of Authorization or Charity/Nonprofit documentation. In both instances Front Office teammates should ensure that the account has provided the necessary documents and a period of more than 48 hours has passed without response from our Compliance team.

 Payments Virtual Support should not be engaged with questions if the account is still in KYC pre-check, pending review status, has not already provided all required documentation, has not corrected information which they know is incorrect or the payout block has been placed due to other reasons outside of KYC failure such as general suspension / restriction, Seller Performance or AML - all these scenarios can be resolved by Front Office teammates using the appropriate tools and CSKB articles.

 Document Reviews (Partner)

 As we only have documents accessible for in-house teammates, we are allowing Partner teammates to use Payments Virtual Support. The Payments Virtual Support teammate will be able to check documents and pass on advice as to what needs to be corrected if the document is not sufficient or if it looks correct and we need to request manual review from our payment processor.

 Payout Reversals

 If for some reason the bank reverses the payment we send to a seller, the payout could fail. There are a number of reasons, including AML, Bank account closed, etc. If these payouts are reversed 3 times, we will remove the bank account. This can be seen in the wallet view in Agent Desktop - the bank account shows as inactive.

 The customer will have a banner to add a bank account - even though the bank account can be seen on the eBay account, it has been removed and we are unable to send the sellers payouts to it.

 Sellers will need to contact their bank and ask why the funds are being reversed.

 After the customer has spoken with their bank, and the bank has removed the block/payout reversals or given them a different number, they need to come back to the Payments tab and edit/re-enter their bank account, which will be updated on eBays end.

 If the customer is having trouble in re-adding a new bank account or confirming their current bank details please reach out to Payments Virtual Support for assistance.

 Bank Re-Entry

 In instances where we have followed the current process to help sellers change their bank when they have been unable to enter the old bank details but this has still led to them being unsuccessful at adding a new bank please contact Payments Virtual Support for additional support.

 Please ensure to have followed the workflow (available in GUIDE1653) of Hard Verifying the account, placing an issue 893 and having the account reattempt adding a new account before reaching out for support.

 Unsuspending Failed KYC Accounts

 There are some cases when a seller account may have become suspended on our payment processors side. For approved scenarios, Payments Virtual Support can unsuspend the seller accounts on our payment processors side.

 Within the Seller Verification view, you will be able to determine if a seller is suspended as their status under Payment Account Status will show a red X with Suspended as the current state. In addition, you can also review the Account Details tab in Workbench. This will also show the Account Status as Suspended.

 This is a rare use case and should only be used if the customer was suspended for the following reasons: <ul> Seller is suspended with our payment processor due to an eBay caused reason. Example: A bug preventing the seller from passing KYC, Banner isnt resurfacing or information is not being pushed to the payment processor. Seller is suspended due to a bug with our payment processor. Seller passed the timeline to remediate by not being prompted about completing the KYC process. Seller attempted too many times and was blocked while trying to complete the KYC process. If the customer meets one of the requirements listed above they qualify for reinstatement of their account. Before taking this action you must check and verify the following information. The customer must be hard verified before reinstating the account. Payment Dispute Appeals If an account wishes to appeal a payment dispute and receive a credit for the Payment Dispute Fee they have been charged you must use the Guided Judgment flow in order to validate the appeal, and you must check for any previous credits to prevent duplicate payments.

 If the Guided Judgment workflow advises that the dispute qualifies for an appeal, and there are no previous/duplicate credits or payments, please consult with the Payment Escalations team to submit an appeal. If the Payments escalation teammate confirms that the appeal is valid, they will ensure the appeal is added to the daily file to be paid out.

 Note: Sellers should expect to see their dispute appeal payment in their Available funds within 48 hours.

 In the event where a Payment Dispute has closed yet the hold is still on the funds related to the case you can contact Payments Virtual Support in order to get this hold released. You must be sure to check the claim is closed and the funds are still on hold, while also including the following information so Payments Virtual Support can action appropriately: <ol> Seller ID Claim ID Date when claim closed Order ID Amount to be released Reason for Release
 Front Office teammates must also file a bug ticket as all claim closures should result in the hold being automatically released. ARN From time to time, a customer may require their ARN - Payments Virtual Support can help advise of this number.

 Low ASP promotion in UK - Opt in / Opt Out Requests

 Requests from Sellers to opt in or opt out of the low ASP promotion in the UK. Please escalate to Payments Virtual Support who can ensure the user Ids are included in the weekly batch.

 2+ Contacts to GCX to remedy the same issue (7 days)

 If a customer has previously contacted us more than twice in the previous 7 days in relation to the same issue, please engage Payments Virtual Support to expedite their query and aim to resolve their issue quickly.

 To get help on any of these topics please follow the below steps: <ol> Inform the customer that you will place them on hold while you conduct further research. Set appropriate hold expectations and place the customer on hold. Click the existing Expert button to begin a Consultation with Payments Virtual Support
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/complaint2-1.png"> Select "Expert Phone"
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/complaints2-2.png"> Select the correct CCR. Add Notes: OJT class (if in OJT): ASAC: Case ID(s): Order ID(s): <ol start="7"> If there is a wait time or the hold is nearing 2 minutes, follow standard hold SOP and check in with the customer. Once the Payments Virtual Support is on the line, inform them of the reason for the contact and what issue you need support with. Once the Payments Virtual Support teammate has provided the necessary information, you can relay this back to the customer. If the customer is then requesting to speak to a leader, you should initiate transfer of contact to Virtual Support by placing the customer back on hold and advising the Virtual Support teammate the customer would like an escalation. Teammate should bring the customer on the line Complete the warm transfer immediately and go back into available How to contact Payments Virtual Support via phone To get help on any of these topics please follow the below steps: <ol> Inform the customer that you will place them on hold while you conduct further research. Set appropriate hold expectations and place the customer on hold. Click on the Conference button to begin a Consultation with Payments Virtual Support. Select the "SLS" tab. Select the correct CCR. Add Notes: <ul> OJT class (if in OJT): ASAC: Case ID(s): Order ID(s): Did you contact SME before escalating? Why is the customer escalating?   If there is a wait time or the hold is nearing 2 minutes, follow standard hold SOP and check in with the customer. Once the Payments Virtual Support is on the line, inform them of the reason for the contact and what issue you need support with. Once the Payments Virtual Support teammate has provided the necessary information, you can relay this back to the customer.[Anchor] How to escalate a contact to Payments Virtual Support via phone Before transferring to Payments Virtual Support If a customer contacts the Payments LOB and is requesting to speak with a customer of leadership on a Non-Payments topic: <ul> The teammate should de-escalate the contact and inform the customer that you will be connecting them to the correct department. The teammate who takes over the contact will then address the situation appropriately and escalate if requested to their Virtual Support team as needed. Before we transfer to Payments Virtual Support, we should always attempt one more time to de-escalate the call.

 However, it may not be possible to de-escalate a contact and the customer may ask to speak to your lead, supervisor, or manager a second time.

 If we are unable to de-escalate the call and the customer has requested to speak to a customer of leadership for a second time, we will then need to Warm Transfer the customer to Second Level Support using Communicator. Inform the customer that you will place them on hold and reach out to a "customer of the leadership team" to provide them the interaction details. Set appropriate hold expectations and place the customer on hold. Mark the Service Request as Escalated. Click on the Conference button to begin a Warm Transfer to Payments Virtual Support Select the "SLS" tab. Select the correct CCR. Add Notes: OJT class (if in OJT): ASAC: Case ID(s): Order ID(s): Did you contact SME before escalating? Why is the customer escalating? <ol start="8"> Inform the customer of the wait time (If applicable). If there is a wait time or the hold is nearing 2 minutes, follow standard hold SOP and check in with the customer. After 3 check-ins ask the customer if they would like to continue to wait or would prefer a callback request. Click "Transfer to SLS" Once the Payments Virtual Support teammates is on the line, inform them of the reason for the escalation. Once the Payments

Virtual Support teammate has the necessary information, bring the customer back on the line. Complete the warm transfer immediately and go back to available. Do not stay on the line with Payments Virtual Support and the customer. Supporting Screenshots 1. Place the customer on hold:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/LIVE2253_IMAGE1.PNG">
 2. Mark as Escalated and Begin the Warm Transfer:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/pvs5.png">
 3. Select the SLS tab

 4. Select the appropriate CCR

 5. Enter Notes

 6. Review the EWT in brackets next to the CCR

 7. Click Transfer to SLS:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/pvs6.png">

 Callback Requests

 Occasionally, an escalation request may require a callback from a customer of leadership. Below are some examples when a customer may request a callback: <ul> If there is a wait time for Payments Virtual Support and, after informing the customer of the wait time, they ask for a callback. If the customer wishes to escalate but would prefer a callback at a later time instead of being transferred real time. If after waiting for Payments Virtual Support and checking in with the customer on hold every 2 minutes, the customer requests a callback instead of continuing to wait. Starting October 30th, 2023: If after 7pm MST, a callback will be required for SLS Phone contacts. SLS Phones will not be available to take contacts during this time <ul> Talking points: I will need to set up a callback for a member of leadership to call you. You can expect a callback within the next 24 hours.
 What expectation should I set with the customer? Tell the customer that we will do our best to accommodate any specific time requested. In general, we will always try to call back as soon as possible or at the latest within 1-2 business days.
 If a customer asks to speak to a supervisor twice and a callback is required:

Access the Escalation Callback Form Fill in the required fields Submit the Callback Request How to contact Payments Virtual Support via chat 1. Gather all the information from the customer. (See Step 6).
 2. 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.
 3. Click the Chat Support icon in Communicator.
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/New_Chat_1.PNG">
 4. A second window will open.
 5. Select the relevant CCR values. a) Note: Its important that you choose the right CCR classification as it will ensure your question is routed to the correct SME group. 6. Add notes: <ul> OJT class (if in OJT): ASAC: Case ID(s): Order ID(s): 7. Click connect.
 8. Wait for the next available SME.
 9. If the customer is on hold, check in at least every two minutes.
 10. Make sure that you fully understand the SME's answer before ending the chat.
 11. If SME chat is not available, or the wait time is longer than two minutes: a) Let the customer know you're still looking into it.
 b) Offer a call back.[Anchor] How to escalate a contact to Payments Virtual Support via chat
   Steps for opening a chat 1. Choose the transfer button from the bottom action bar:
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/New_Chat_2.PNG">
 2. Select the SLS tab, enter notes*, choose CCR and click Transfer to SLS when the button is activated (blue color):
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/New_Chat_3.PNG"> *Use the below questions as a template for your notes: <ul> Reason for escalation? What was the tone of the conversation? Angry, sad, polite? Did something specific trigger the escalation? Are there any risks? Eg: Harm, account closure What resolution(s) have been offered already? What questions/issues does the customer still have? 3. The interaction will then disappear, teammates that sent the SLS transfer can move on to the next interaction.
 4. When the receiver of the SLS interaction gets the chat assigned, it will look just like any other chat, they will need to look at the Notes section.

 Anything that the sending teammate entered in notes during the transfer will appear there.
 <img alt="" src="https://cskb.qa.ebay.com/library/EBAY/2253_LIVE/New_Chat_4.PNG"> Double Escalation SOP - Payments Virtual Support Team ONLY
   If the customer is already speaking to a Payments Virtual Support team customer and is requesting to speak to another Payments Virtual Support team customer: <ul> Ask the customer, Would you like to speak to another customer of the leadership team because you are not satisfied with the resolution or to provide feedback on the service I offered to you today? If the customer is not satisfied with the resolution provided   Payments Virtual Support will inform the customer that they are talking to someone from the leadership/escalation team already and he/she wants to help the customer. The Payments Virtual Support teammate will keep ownership of the escalation and give final outcome of the issue even if customer wants to continue to escalate Talking points I understand that youre frustrated but I want to reassure you that youre talking to a customer of the team that is the highest point of escalation already and I am confident that you are being provided with the most accurate and appropriate resolution for your concern. If the customer is requesting to provide feedback on the service the Payments Virtual Support TM 1 offered <ul> Payments Virtual Support TM1 will do a warm transfer to another Payments Virtual Support TM 2 within the same team/queue Payments Virtual Support TM 2 completes a warm transfer with Payments Virtual Support TM1(when possible) and takes over the contact Payments Virtual Support TM 2 will give final outcome of the issue and keeps ownership even if customer wants to continue to escalate
 Important: For hearing impaired customers, team leaders can contact your customer through the service they use, as appropriate. See Helping customers with accessibility issues for more details

 See also Talking Points for phone and chat <h3>Customer wants to speak to a manager</h3> When a customer requests to speak to someone higher than yourself, follow these guidelines: <ol> Attempt 1 more time to resolve your customer's issue (de-escalation) acknowledging your customers' request. If your customer asks to speak with a team leader a 2nd time, honor their request. Provide them with a choice of the following options: Immediate contact with a team leader (best option). Callback at a convenient time within the next 24 hours. Detailed information: <ul> 1st: at all times, take ownership and feel that you're empowered to attempt 1 more time to resolve (or "de-escalate") your customer's issue while you also acknowledge your customer's request. 2nd: if your customer asks to speak to a team leader a 2nd time, reach out to your own Team Leader first (if they are not available, reach out to any Team Leader/Coach). If they're unable to de-escalate, the customer of the Leadership Team checks availability of their Line of Business Manager.   3rd: the team leader for each LOB is responsible for ensuring appropriate escalation support for their area, including off-peak hours, and with the support of the overall line management. If there are no team leaders/coaches available at the time of the contact, then let your customer know that you can offer a callback from a team leader within 24 hours. In this instance the following process applies: <ul> You complete the email template and send it to your Team Leader and Coach. Re-assign the SR to your Team Leader. Your Team leader or Coach will investigate the issue. They will call back your customer and resolve the issue.   Chat: <ol> During the 1st customer request to speak with a team leader, teammate attempts to de escalate (see below link to Talking Points)

During the 2nd customer request to speak with a team leader, check availability of a Line of Business (LOB) team leader who can take over the contact right away. If a team leader is unavailable at that time, look for designated 2nd level support to take over the contact. In the exceptional case that no one is available, you can arrange for a callback at a suitable time for your customer.   Ensure the customer's expected timeline is followed. Complete an email template and send to 2nd level support (onsite at Partner or eBay as appropriate) and set the expectation that a response is priority or no less than 24 hours from the original email date stamp. See also Talking Points for phone and chat&nbsp; Email: <ol> On a 1st request for a team leader to look at the email case, a decision will be taken if the team should respond or immediately send the email to 2nd level support (onsite at Partner or eBay as appropriate) requesting a timely response from a team leader within 24 hours and as soon as possible. The 1st time your customer requests a callback from team leader, immediately send an email to 2nd level support (onsite at Partner or eBay as appropriate) requesting a timely phone call to take place within 24 hours and as soon as possible. </h2><h2>GUIDE.SUMMARY This article summarizes the most common CS escalation reasons and how to handle them: <ul> General guidance De-escalation SLS escalations Virtualized support Customer asks to speak to a supervisor or manager </h2>