



## CEC – Customer calling for a store/employee

**Purpose** Follow these procedures when the customer's immediate need is to speak with a store employee.

**Guidelines** When customers call and ask to speak with a store employee, we must provide them with **“More Choices”** before transferring them to the store.

Before offering More Choices:

- **Address the immediate need by confirming that we can get them in contact with the store and/or specific employee at the store.**

Before transferring, we must inform the customer of three items:

1. **We are here to help, is there something I can assist with**
2. **Offer to gather their information to receive a call back from the store. (Waitlist)**
3. **We can transfer them, but they may be placed on hold while the store employee finishes with their current customer**

**Process**

Depending on the customers response you will do one of three options:

1. Help the customer with their true need.
2. Add them to the waitlist for the store to contact.
3. Transfer them to the store utilizing a warm handoff.
  - a. A warm handoff means you will get the specific person on the phone for the customer and share the information you have about the customer. (name, immediate need, etc.)

**Contact**

Please see your assistant manager if you have any questions.