1

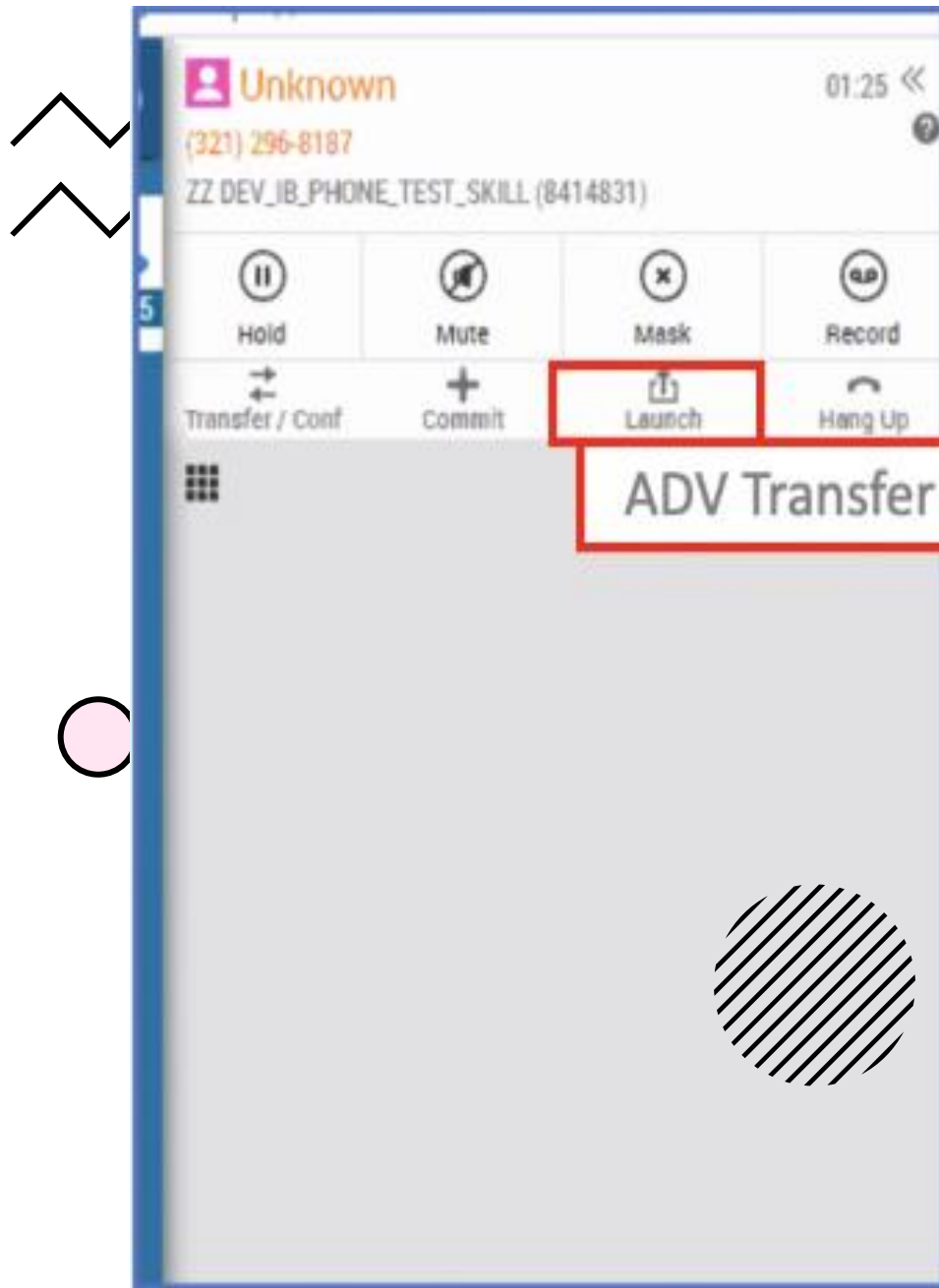# Cold Transfer Form

1. From you MAX agent soft phone, click Launch -> ADV Transfer.

2. The advanced transfer form will open. The form may be blank, or some information may have been pre-filled by the phone system.

Fill in each of the fields using the available information for the customer from GUI/AMS:

1) **Policy Number** - the policy number for the policy that the call is in reference to
   a) If caller could not provide the policy number and it could not be found in GUI/AMS, leave blank

2) **Caller's name** – the name of the caller as stated by the caller
   a) This is not necessarily the insured customer if it is someone calling on behalf of the customer.
   b) Example: If this is Linda calling from Chase Bank about a customer named John, you would put "Linda from Chase Bank"

3) **AMS Customer Number** – the customer number you located in GUI/AMS when looking up the customer account.
   a) If customer could not be located, leave blank.

4.) Caller has been authenticated- check this box if you were able to verify the caller by confirming the policyholder's name and address.

       a) NOTE: It is important to check this box if caller is verified, as it will alert the next representative not to re-verify the customer's information.

       b) It is important **NOT** to check the box if caller could not be verified.

5.) Notes – a brief description of the caller's stated reason for calling. Some examples:

      a)   Questions about a renewal letter they received

      b)   Needs to remove a vehicle from their auto policy

      c)   Calling to update mortgage information

6.) Transfer Skill – Select the skill to transfer, referring to the **Call Screening Decision Flowchart**

4. → ☑ **Caller has been authenticated**

Notes

Mr. Roberts is calling increase liability to $500k and pay his premium.

5. →

6. → IB Florida ⌄

CANCEL   Transfer

7.) Click the **Transfer** button at the bottom of the form. The call will immediately transfer and end for you after the transfer button is clicked.

CALLS FROM CUSTOMERS FOR SERVICE ON AN EXISTING PROGRESSIVE AUTO POLICY

If a call from a customer is related to service on an existing Progressive policy, we will ask the customer if they would like to be transferred to Progressive.
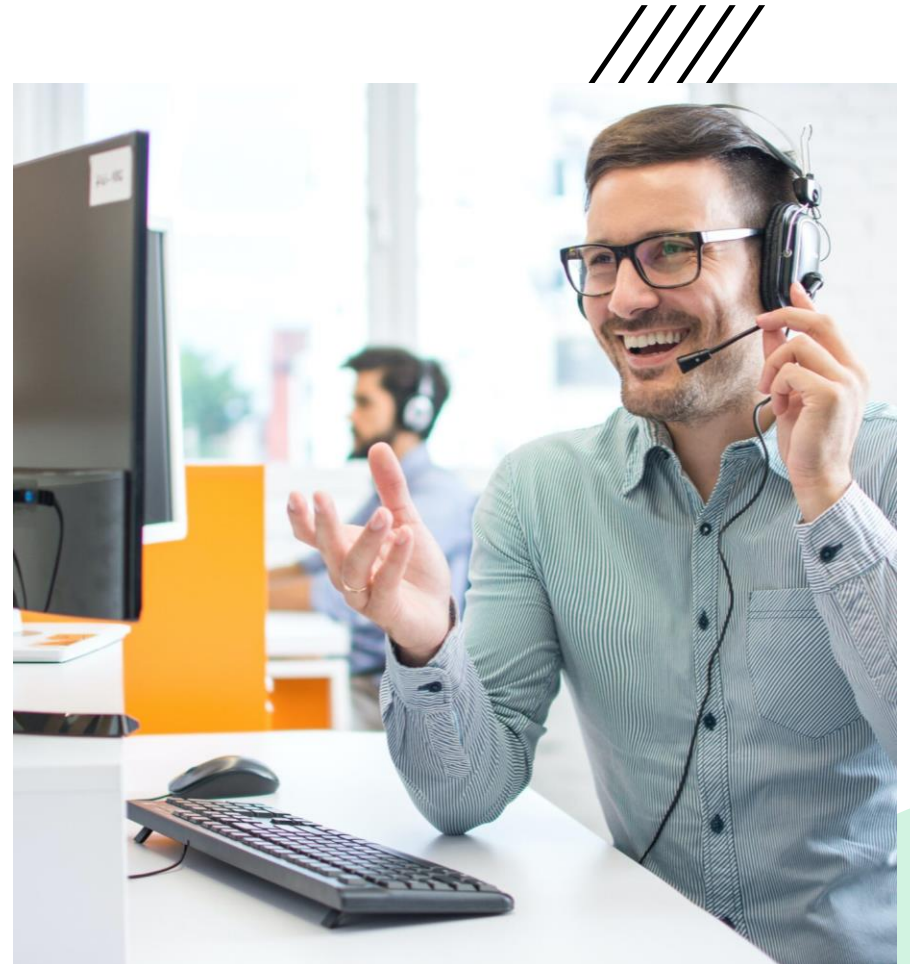
SCRIPT

CSR: "I am going to get you over to a Progressive representative who can assist you further."

Then proceed to transfer the call to Progressive

CALL FROM CUSTOMER TO FILE A CLAIM

If call from a customer is related to filing a claim, we need to first show empathy.

Script

➢ **CSR:** "I'm sorry to hear that, I hope everyone is ok? I'm going to get you to a representative at the carrier to further assist you from here. The hold time may exceed 1 – 2 minutes. Thank you for choosing Brightway and have a great day"

➢ **Transfer to carrier directly**.

QUESTIONS?