



2-1-1 Text Handling Policy and Procedures

Policy Statement

The text handling policy provides guidance on how 2-1-1 contact center agents are to handle requests for assistance via text.

Reason for Policy

This policy is in place to ensure that text requests for assistance are handled with the same quality expectations and customer service level as any other type of request.

Who Should Read This Policy

- 2-1-1 Contact Center Agents
- 2-1-1 Contact Center Supervisors

Policy Overview

- A. Customer Service – Text response and handling must meet quality standards in Contact (Greeting and Building Rapport), Assessment and Clarification, Information and Referral Giving, Communication Techniques and Closing.
- B. Documentation – Texts must be fully documented and meet quality standards for completeness and accuracy.

Text HANDLING PROCEDURES

General Text Assumptions: Texting will take longer than a phone conversation. This may be for a number of reasons, but the two primary reasons are because consumers may not be very fast typists

and because consumers often walk away, get distracted, etc. while carrying on a text. This is doubly true if it takes a while for an agent to respond.

General Information – Text Queue Function

1. An agent will only be allowed to handle up to three texts simultaneously. The maximum of three texts is in place to prevent an agent from being unable to keep up with streams of conversations and ensure focus is on the person who needs assistance.
2. In order to receive a text, the agent must be skilled to receive a text and must be in an **Available** state.
3. When all text skilled agents are available, the text will queue and wait for the next available skilled agent. Waiting texts can be viewed on the wallboard in the Chat, Text, and Email Queue.
4. The system automatically thanks the consumer with the following message: “Thank you for contacting United Way 2-1-1 Missouri and Southwest Illinois. To help us locate resources in your community, please enter your zipcode.”
5. Once the consumer enters a zip code, the system then thanks the consumer: “Thank you. Please wait while I get an agent to assist you.”

General Information – Receiving a Text

1. If an agent is available and skilled when a text comes in, the agent will be notified that a text is being offered to them.
2. The agent must click the green check in order to accept the text.
3. When an agent is first assigned to a text skill they should go to settings and allow notifications for text and ending of texts. By doing this, an agent will receive a tone on their headset, notifying them that a text has been sent to them.
4. When a text is sent to an agent, they must click on the accept button to begin texting.
5. There are three options when responding to a text
 - a. Transfer – only be used with permission by a supervisor
 - b. End – only used after all closing procedures are followed. This will end the text with the consumer.
 - c. Text Box and SEND button – the text box is where the agent types out messages to the consumer. The agent can click on the SEND button or press enter to send a message.
 - d. To help the agent see what they are typing, the agent can Maximize the text box by clicking on the picture icon of a box.
6. In addition, the agent can Bold, Italicize and/or Underline text.

General Information – Responding to a Text

1. Although a greeting has already been issued by the system, once a text has been accepted, the agent should respond with an introduction and offer to assist.
 - i. Good afternoon. My name is Robin. How can I help you today?
 - ii. Hello. My name is Robin. How can I help you?

2. If there is no response after 5 mins of waiting, it is okay for the agent to END the text. However, prior to ending the text, the agent must make a few more attempts to engage and must explain why they are ending.
 - i. Hello? Are you there? How may I help you?
 - ii. I'm sorry we weren't able to connect. Please try again when you have more time. We are available Mon-Fri from 9am to 5pm by chat or you can call us 24 hours a day by dialing 2-1-1 or 1-800-427-4626. Thank you.
3. If an agent has been texting but then the person becomes non-responsive, the agent should wait 5 mins before ending text. Agent should make several attempts to engage during the 5 min wait prior to ending a text and must explain why they are ending a text.

Handling Text Requests for Assistance

1. Start a new **Call Record** in *Service Point*.
2. Introduce yourself and ask how you may assist. Wait for response (disconnect after 5 mins of no response).
3. Once the consumer has explained what they are looking for:
 - a. Type an empathy statement
 - b. Type an agreement to help
 - c. Ask any clarifying questions needed to complete an assessment of needs
 - i. Empathy Statement Example – “I sounds like you are going through a lot right now and I will be happy to look to see if there is anyone helping with X.”
 - ii. Clarifying Question Examples –
 1. “To help me see what might be available; may I have your age, household size and monthly income?”
 2. “Would you mind telling me a little bit more about what has happened to get you behind on X?”
 - d. Thank them for any information they share.
 - i. Thank you for that.
 - e. Let them know the next steps:
 - i. “Okay, I will look to see if there anyone helping with that. If you have any additional questions while I’m looking, go ahead and type them and we can talk about them in a few moments. This may take a few moments.”
 - ii. “Okay, I’m going to look to see what I can find.
4. Complete your search in *Service Point*, document needs and referrals. Chat with the consumer about what you have found. Give them detailed information about how they can access they services (See transcript below).
5. Upon completion, try to go a step further to see if there are any underlying or unstated needs. If so, offer to help with those and repeat step 4.



6. Once you have aided to the best of your ability with their presenting needs and underlying/unstated needs, ask if they need anything else.
 - a. “Is there anything else I can help you with?”
 - i. If yes, repeat step 4
 - ii. If no, thank them for contacting United Way 211 and explain when we are available.
 1. Thank you for contacting United Way 211. If you need further help, you can text us Mon-Fri from 9am to 5pm or call us 24/7 by dialing 211 or 800-427-4626.
7. Click END to end the text.
8. The inContact system will want you to then choose Disposition. Before, choosing, copy the transcript and paste it in the notes field in Service Point and make sure all documentation is thoroughly complete and accurate.
9. Then choose Chat Disposition from the drop down. This will instantly place the agent back into an available state.

