



OBJECTIVE

Settle in advance the situations where the agent stops deciding and calls a human. A cautious agent is worth more than a self-assured one.

1 THE TRIGGERS · THE AGENT ROUTES, IT DOES NOT GUESS

- ✓ An amount approaches or exceeds the cap
- ✓ A request outside the agent's perimeter
- ✓ Low confidence: the agent judges its own answer uncertain
- ✓ A dispute tone: threat, lawyer, distress
- ✓ A case the constitution defines as non-delegable

2 THE ROUTING

TO WHICH HUMAN

The role that takes over, named

MESSAGE TO THE CUSTOMER

What the client reads while waiting

THE HANDOVER

What the human receives with the case

An escalation that leaves the customer without an answer is worse than no escalation at all.