Answering & Transferring Phones

Internal

2-21-2025

Contents

Revision History

Effective Date of SOP: 2/21/2025	**SOP Number:** M.03
Functional Area Name: Internal	**Division Name:** All
Last Review Date: 1/27/2025	**Last Reviewer:** Kris Dixon, Customer Success Manager
Next Review Date: 1/27/2026	**Next Reviewer:** Customer Success Manager
Executive Approval Date: 2/21/2025	**Approved By:** Jaclyn McDuffey, Chief Product & Experience Officer

Overview

These standard operating procedures (SOPs) outline the process for answering and transferring Service Oklahoma (SOK) phone calls. The procedures address how calls are managed in InContact, when transfers occur, and what subject matter experts (SMEs) should know when answering.

Purpose

The purpose of this document is to help all SOK employees understand how and why they receive the phone calls they do, as well as how to approach a call and who to transfer it to if they are not the correct contact.

Policy Statement

These SOPs apply to all calls from customers or licensed operators and all employees who might receive them. The information is most relevant for the Business Support Services team and SMEs, but everyone at SOK should understand the process.

Compliance

The most important regulation governing phone procedures is the Federal Drivers Privacy Protection Act (DPPA), which prevents state DMVs from using or releasing drivers' personal information. SOK uses a third party called Apex to field customer calls, so their procedures are most tightly controlled by their contract with SOK.

Systems

All incoming calls are answered and transferred using the cloud contact software InContact.

Roles

List the roles and functions of anyone involved in the operations described within this document.

Role	Responsibilities

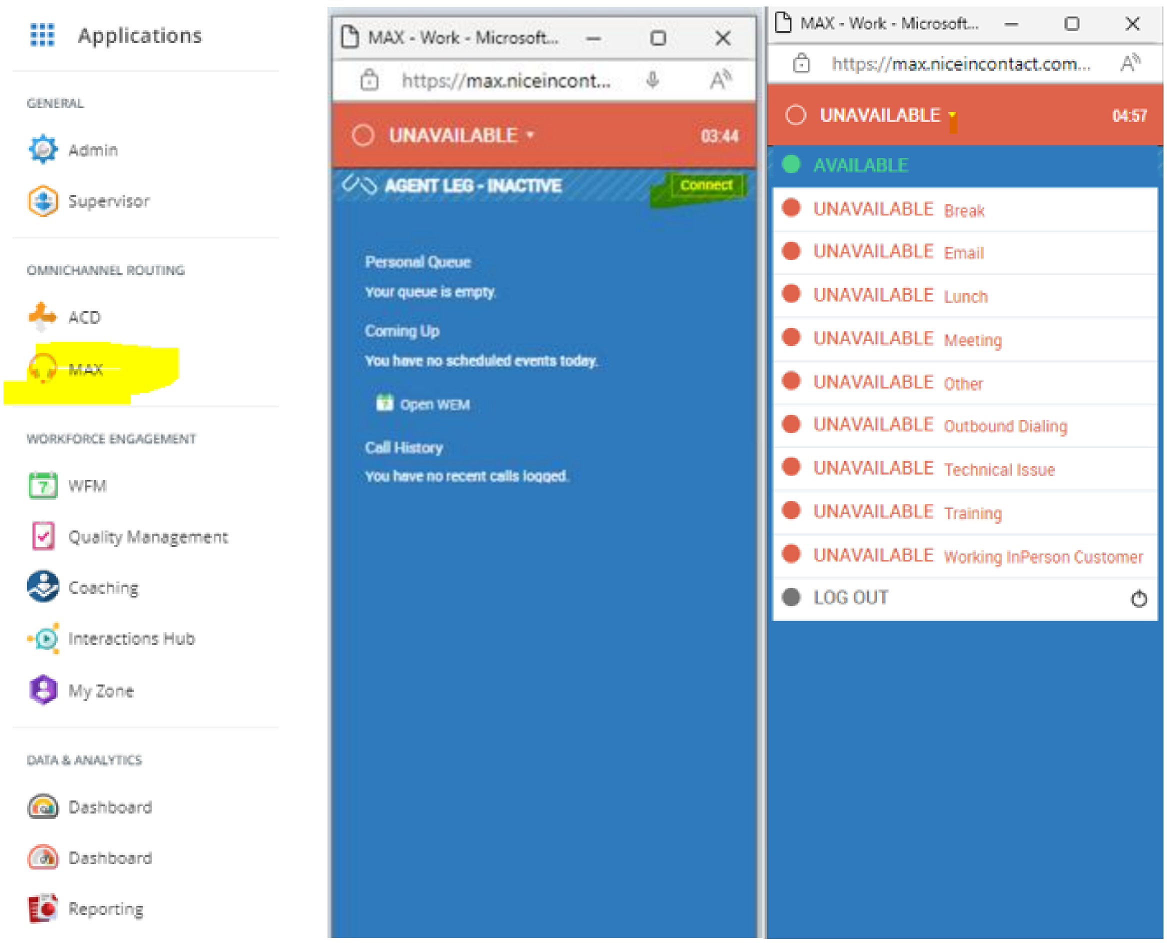
Apex Representative	Answers all calls except those about collisions and motor vehicle records, resolves most calls, tickets or transfers the calls they are not equipped to handle
Business Support Services team	Answers calls about collisions and motor vehicle records
Subject Matter Expert (SME)	Resolves tickets, answers calls transferred from Apex

Procedures

Calls from Customers

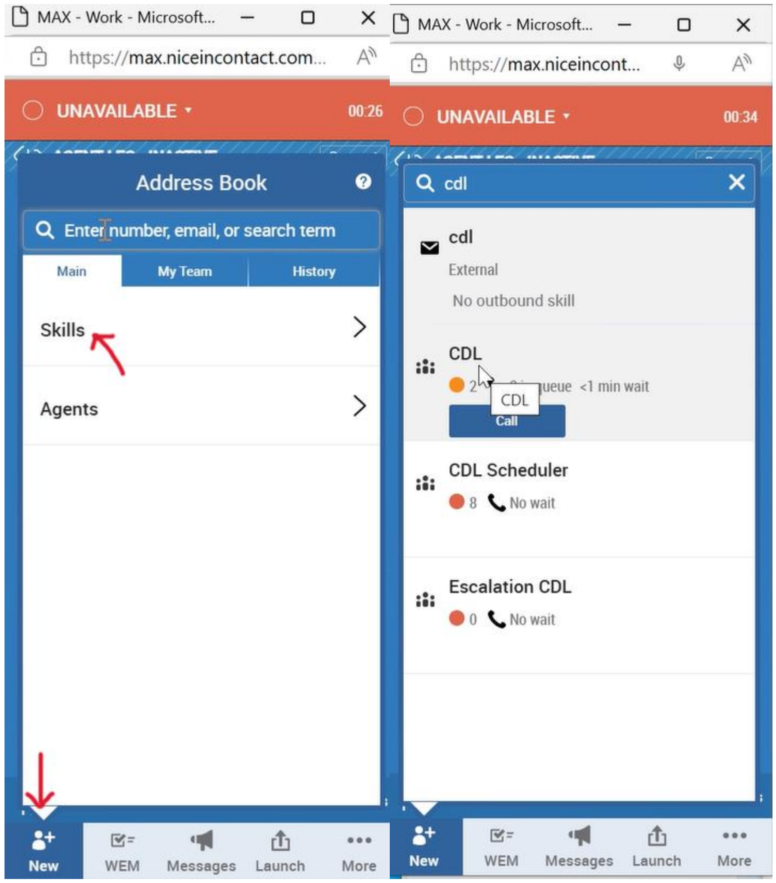
1. When a customer calls SOK, they are directed to an automated option menu through InContact (*See Appendix B and Appendix C for Automated Menu Options*). The customer is instructed to press the number that corresponds with the topic they are calling about. If they choose 5 (auto and vehicle), there is a second menu of sub-options. All calls are answered by a representative from Apex, the third-party provider contracted to provide front-line services for SOK.
    a. The only exception is calls related to collisions and motor vehicle records (MVR) – option 5, then 6. Collisions and MVR calls go directly to the Business Support Services team because Apex does not have access to the necessary records. Business Support Services does not have a voicemail system, so if they are unavailable, the customer is directed to Apex and usually needs to call back later.
2. Apex representatives have the knowledge and access to address almost all the calls they receive. Most cases can be closed at this point, but some customers need to speak with a subject matter expert (SME) or make changes to their account, which Apex cannot do.
3. If an Apex representative can't resolve a customer's issue, they must decide whether to open an escalation ticket or transfer the call to the relevant SOK department. Typically, a ticket is opened for account-related requests that can be resolved easily by an SOK employee with the required access. If the customer's question is complex or the situation warrants escalation, the call is transferred to a SME in the appropriate department.
    a. Transfer the call by pulling up the relevant skill in InContact and selecting someone whose status is available.
    b. Calls that warrant immediate escalation include those from irate customers, high-ranking officials (Senators, Representatives, Governor's office, etc.), on-duty police officers, and customers whose job is at stake.
4. It now becomes the SMEs' responsibility to resolve the customer's issue.
    a. Tickets: The Customer Success Manager often intercepts and resolves tickets before another department gets to it, but if that does not happen, the ticket enters the relevant department's 'Phone Call Follow-Ups' Teams channel and an available team member resolves it as soon as possible. The customer receives an automated email to the address given to the Apex representative when their ticket is opened and when it is closed.
    b. Transferred calls: Once transferred, calls appear directly on the receiving SME's device. The Apex representative will first connect with the SME to explain the situation and then patch in the customer. If the SME is unavailable, an automatic email is sent to the Chief Product and Experience Officer, Customer Success Manager, and the Department Manager, and the customer's call is redirected to another department.
        i. SMEs are responsible for keeping InContact open on their devices. The steps to do so are as follows:
            1. Log in to InContact using your SOK email and password.
            2. Navigate to Applications – Max.

3. Click Connect, allow microphone access when the prompt appears, and select Available from the drop-down at the top.



ii. SMEs may need to collect information such as date of birth, social security number, license/vehicle number, or address before moving forward with a call. No SOK employee should ever give out this information.

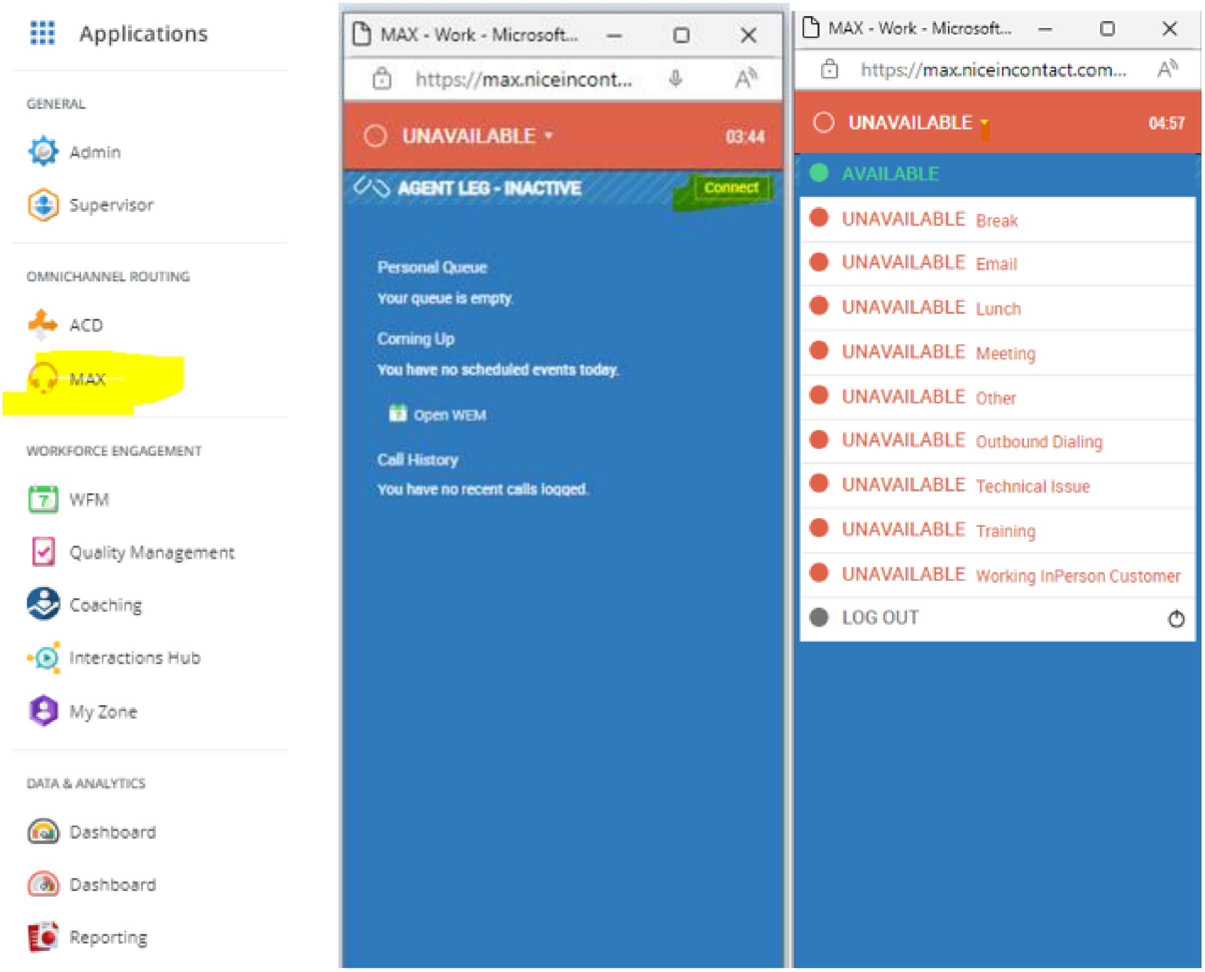
iii. If a SME can not answer a question or has been contacted accidentally, the SME can transfer the call to another SOK department. To do this, the SME clicks 'New', then 'Skills', then scrolls and clicks the relevant skill, making sure to choose one that has at least one SOK employee in the queue. The SME can also use the search bar at the top to retrieve the relevant skill.



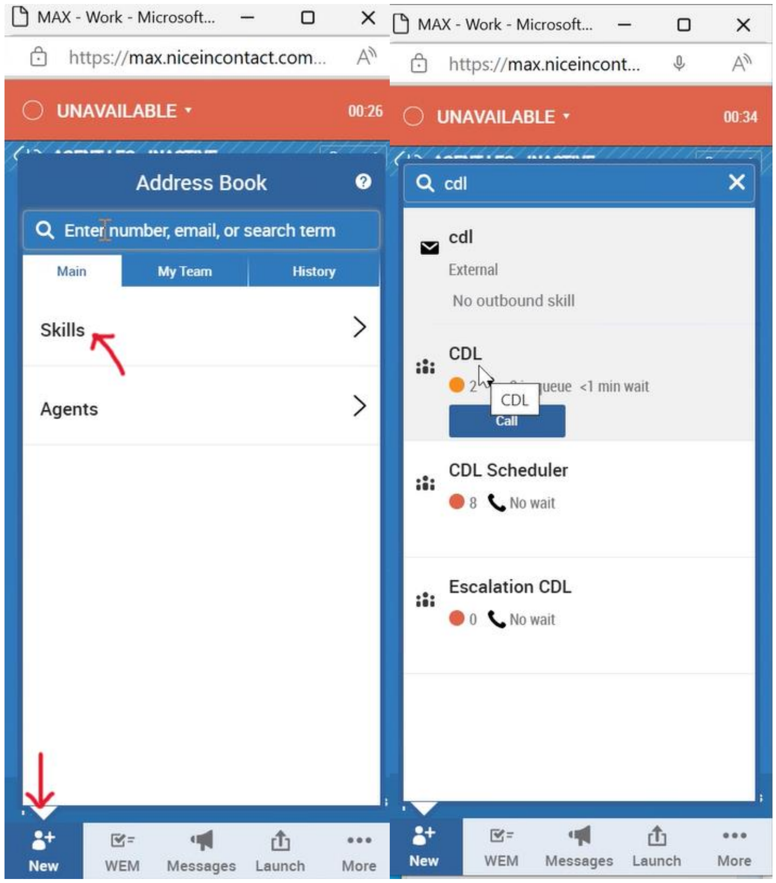
5. All call details, including the option selected, time spent on hold, representative assigned, recording, transfers, and any notes added, are automatically documented in InContact and can be revisited at any time. InContact also generates weekly reports.

Calls from Licensed Operators

1. When a Licensed Operator calls SOK, they are directed to an automated option menu through InContact (*See Appendix B and Appendix C for Automated Menu Options*). The operator is instructed to press the number that corresponds with the topic they are calling about, and some options have a second menu of sub-options. All calls are transferred to a SME in the appropriate department.
2. Calls from licensed operators appear directly on the receiving individual's device.
    a. SMEs are responsible for keeping InContact open on their devices. The steps to do so are as follows (see Appendix C for screenshots):
        i. Log in to InContact using your SOK email and password.
        ii. Navigate to Applications – Max.
        iii. Click Connect, allow microphone access when the prompt appears, and select Available from the drop-down at the top.



b. If a SME can not answer a question or has been contacted accidentally, the SME can transfer the call to another SOK department. To do this, the SME clicks 'New', then 'Skills', then scrolls and clicks the relevant skill, making sure to choose one that has at least one SOK employee in the queue. The SME can also use the search bar at the top to retrieve the relevant skill.



3. All call details, including the option selected, time spent on hold, representative assigned, recording, transfers, and any notes added, are automatically documented in InContact and can be revisited at any time. InContact also generates weekly reports.

References

Compliance

1. The Drivers Privacy Protection Act (DPPA)

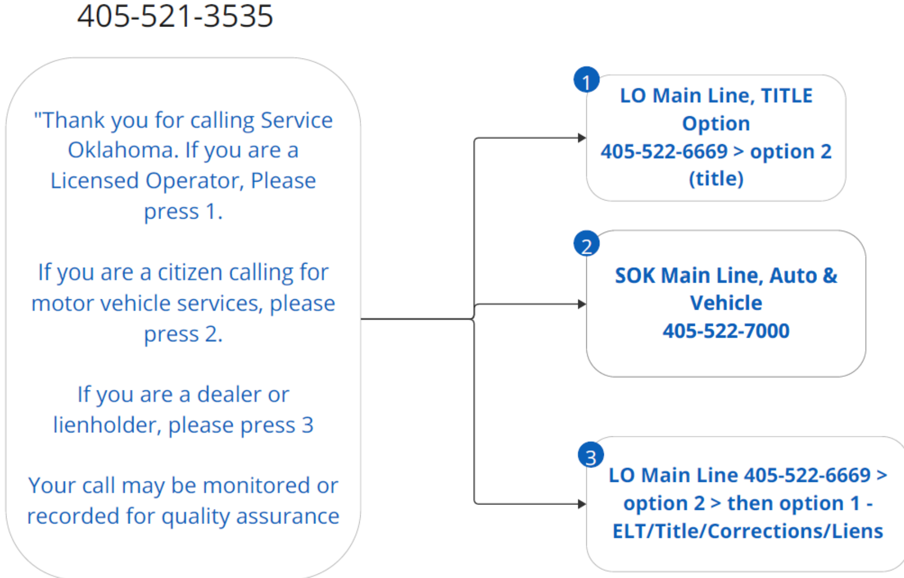
SOK Documentation

1. Phone Training Manual_3.10.23
2. MAX Guide

Appendix

Appendix A: Call Transfer Directory

Appendix B: Motor Vehicles Automated Menu



Appendix C: Driver License Automated Menu