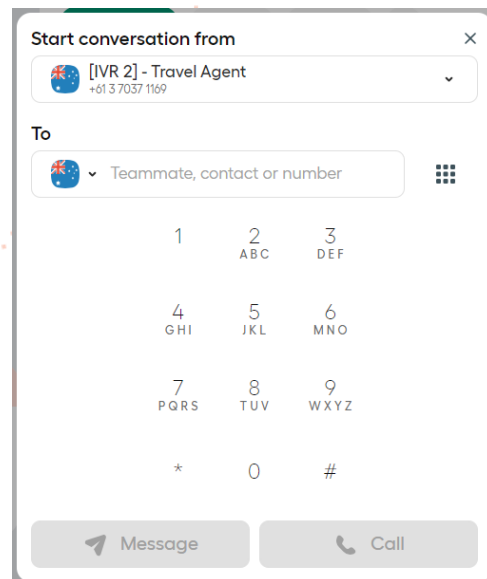
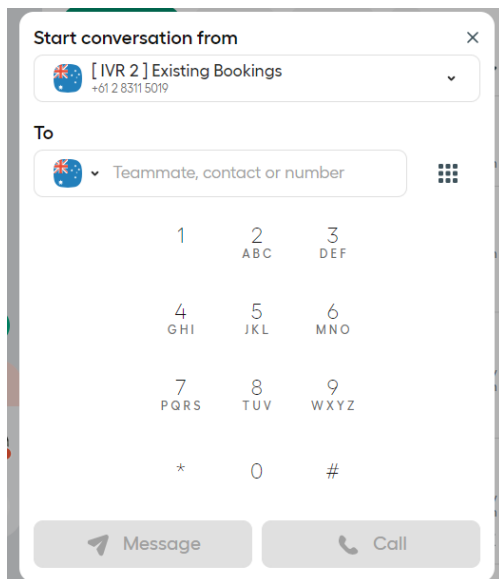


Outbound Call Guidelines

These guidelines outline the proper process for making outbound calls, ensuring calls are placed under the correct IVR, accurately tagged in Aircall, and properly documented in playbooks where required.

1. Using the Correct IVR

- **CS Tier 1 (CS MNL)** – Use **IVR 2: Existing Bookings**
- **CS Tier 2 (TA MNL Existing)** – Use **IVR 2: Travel Agent**



2. Aircall Tagging

- All outbound calls must have the **appropriate tags**.
- Multiple tags may be applied if several concerns are discussed in the same call.
- **Special Note for Tier 2:** If the call involves a travel agency, the **Travel Agency name must be tagged in Aircall** if available.

The screenshot displays the Goway CRM interface for a contact named Amy Strong Strathpine. The contact's phone number is +61 7 3205 9033, and the agency is helloworld Travel Strathpine. The interface shows a list of tags for the contact, including 'Documents - Follow ...', 'Flights - Issues', 'General - Itinerary / I...', and 'Helloworld Agency'. A 'Save changes' button is visible. Below the tags, there is a list of checkboxes for various call types: '1000 MTG Agency', 'B2B outbound', 'Cancellations', 'CJ- Post docs call', 'Credit Enquiry/Rebooking', and 'CS MEL - Escalations'. A 'Send' button is located at the bottom right of the interface.

3. Playbook Requirements for Outbound Calls

- **When to Create a Playbook**

- **Callback requests and missed calls** – A **CS Notation Playbook** must be created and completed once the call has pushed through.
 - If the outbound call originates from a callback request task in HubSpot, the agent must also **update the HubSpot task** in

addition to completing the CS Notation Playbook.

- **When a Playbook is Not Required**

- If the outbound call attempt is **unsuccessful**, a CS Playbook task is **not required**.

