CUSTOMER SERVICE

Your WhatsApp Agent Needs to Know When to Hand Over

A customer explains that the wrong product arrived. The agent asks for the order number, receives it and offers the catalogue again. The customer repeats the problem. Messages arrive immediately, but the conversation is going nowhere.

Define What Falls Outside an Automated Answer

A question about opening hours can use approved information. A dispute, a request requiring identity checks or an exception to terms may need someone with authority. Agree those boundaries before activating the agent and let customers ask for a person.

When reliable information is missing, the agent should say so. It should not invent stock availability, deadlines or decisions to keep the conversation going. A question without an available answer can become a task for the team.

Pass on the Context People Need

- Summarise the reason for contact and the questions already asked.
- Attach the order reference when available, without requesting passwords, verification codes or card details.
- Identify what still needs checking and who should handle it.
- Tell the customer whether someone is available or during which hours the request will be reviewed.

The human owner should be able to read the relevant context and correct an incomplete summary. Decide when automation pauses so it does not keep answering alongside that person. Both sides need a visible handover status.

Test conversations that leave the expected path: a customer changing the subject, a reference that does not exist or an immediate request to speak to someone. Count unresolved cases reaching the team and review why they arrived. Response speed alone does not measure completed service.

The agent works with agreed information and integrations. It does not replace whoever authorises exceptions or guarantee human assistance outside contracted hours.

A Check You Can Run

Try a hypothetical conversation in which a customer asks to change an order already dispatched. The handover should preserve the order reference, the requested change and what the agent has already said. The receiving person needs to know whether anything was promised. While waiting, the automated reply should state that the change is pending confirmation, without inventing a delivery commitment.

Continue with: Your Business Already Lives on WhatsApp. It Just Doesn’t Answer the Same at Every Hour.
https://systems.kavaliero.com/en/blog/your-business-already-lives-on-whatsapp

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https://systems.kavaliero.com/en/services/whatsapp-ai