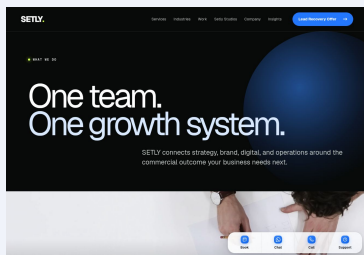


Human handoff design

Make escalation a real workflow instead of an empty promise.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Choose escalation triggers such as an unknown answer, complaint or explicit request for a person.
- 2 Decide where the conversation goes and who monitors it.
- 3 Send the person enough context to avoid asking the customer to repeat everything.
- 4 Test after-hours behavior and failed handoffs.

EXAMPLE - ILLUSTRATIVE

A chat can say the team will reply during business hours only if a monitored queue receives the request.

CHECK YOUR RESULT

Does the handoff create a task that a real person can see?

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Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Trigger:

Destination:

Owner:

Context transferred:

Expected reply window:

Failure fallback:

DONE WHEN

Does the handoff create a task that a real person can see?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.