IntPowers

VCCAAS · WEB ACD

Quick guide for video call agents

The essentials of serving customers by video, from start to finish. Each service adds its own script and rules.



Interactive Powers · October 2026

AT A GLANCE

Seven steps for every video call

From a ready workstation to the final log entry. Each step has its own slide.



1 **Before you connect**

2 **Your appearance**

3 **Getting started**

4 **During the call**

5 **If something fails**

6 **Security**

7 **Wrapping up**

Three habits that change everything: look at the camera · narrate what the customer can’t see · log before moving on

STEP 1

Before you connect

Most failures can be prevented before the first call.

Web ACD tester all green
Account requirements: everything green before you start

A single session, in up-to-date Chrome
closing the tab is not enough: log out

Headset with echo cancellation
never the laptop speaker

Camera at eye level
light in front of you, never a window behind

Close what you don’t use
apps using the mic or camera, videos, notifications



STEP 1 · YOUR EQUIPMENT

What your workstation needs

Minimums for the video call to work well. If your equipment falls short, tell IT.

Chrome

Latest stable version. Firefox as an alternative

8 GB RAM

Recommended. Minimum 4 GB

HD 720p

Camera. Minimum 640 × 480

512 kbps

Upload and download, at least

Full HD

Screen. Minimum 1024 × 768

Headset

With echo cancellation

In the browser, avoid

- Blockers and privacy extensions: AdBlock, Ghostery, WebRTC Network Limiter
- Automatic translation: Web ACD is already in your language
- Several tabs or computers with the same account
- System video backgrounds or effects

STEP 1 · YOUR STATUS

Your Webphone status

You'll see it in the top-right corner of Web ACD. Check it before every shift.

GREEN

Ready

You can receive calls and video calls

YELLOW

Busy

You are on a call or video call

RED

Disconnected

No network or a connection problem

BLUE

Break

Rest, back office, lunch



See a red X on the microphone or camera in the address bar?
Click it, choose "Always allow" and reload the page. If it persists, log out, close the browser and log back in.

STEP 2

Your appearance

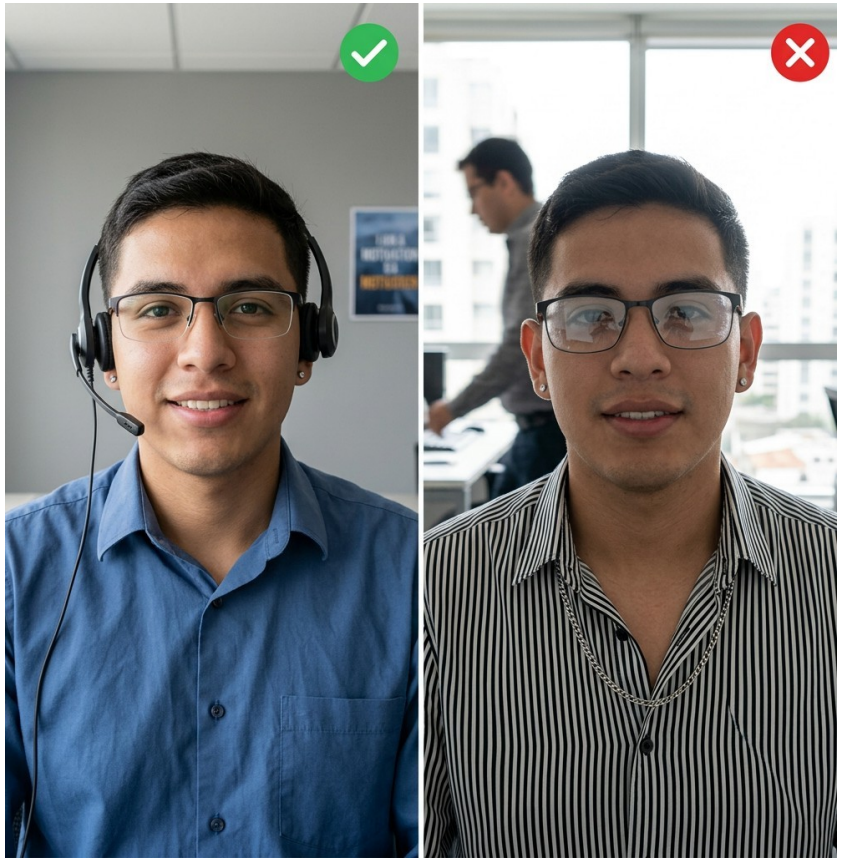
The camera exaggerates contrast, fine patterns and shine.

Yes

- Plain, mid-tone clothing: blue, gray, burgundy
- Discreet jewelry that doesn’t jingle
- Glasses with anti-glare coating
- The service background, unaltered

Avoid

- Pure white or black
- Fine stripes and small checks
- Bracelets and earrings that jingle
- Clutter or people in the background



STEP 3

Getting started

The first few seconds confirm that the connection works and that there is a person who already knows why the customer is calling.

Smile and introduce yourself
“Hi, I’m Laura, from the Insurance team”

Check that you can see and hear each other
“Can you see and hear me clearly?”

Use the data you already receive
confirm it, don’t ask for it again

Give notice before you act
recording, sharing your screen or asking for a document



STEP 4

During the call

Video adds delay and hides part of body language: make up for it.

Look at the camera when you speak
not at the customer's image

Wait a second before you reply
video has a delay

If you look away, say what you're doing
"I'm checking your policy on the other screen"

Short sentences
summarize and confirm each step



STEP 4 · TOOLS

Collaboration tools

Use them when they save explaining. Announce each one before you use it.

Share your screen
Forms, simulations, where to tap. Only the window you need

View the customer's screen
Guide them in their app or website. Ask them to hide other people's data

Send and receive files
Documents and receipts the service accepts

Live chat
Numbers, references and links: whatever is hard to dictate

Snapshot
A document or damage. Ask permission and say what it's for

Flip camera
Have them show an object with the rear camera. Guide them calmly

Picture-in-picture
They keep seeing you while browsing on their phone, without hanging up

Golden rule
"I'm going to share my screen with you, is that OK?"



STEP 4 · TRANSFER

Transfer without making the customer repeat

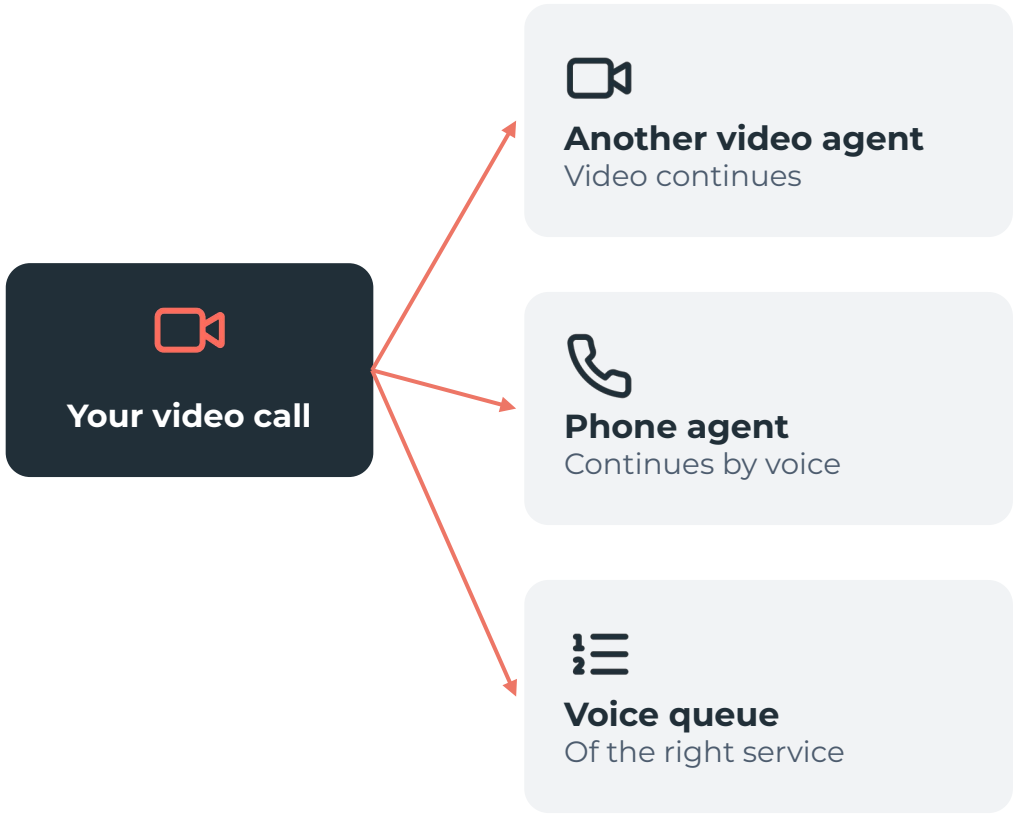
A good transfer is invisible: the customer knows what's happening and doesn't start over.

1. **Explain to whom and why**
   "I'm transferring you to a claims specialist, who will already have your details"

2. **Leave the context in Web ACD**
   Reason, what was verified and what is pending, before transferring

3. **Choose the right destination**
   If the task doesn't need video, switching to voice is fine

4. **If no one is available**
   Offer a callback or an appointment. Never an endless wait



STEP 5

If something fails

Keep serving the customer first; look for the cause afterwards.



Frozen image

Continue on audio only.



Dropped call

Apply the service's callback protocol.



Never blame the customer

"It looks like the connection has dropped."



Is your equipment or your network failing? Set yourself to unavailable, tell your supervisor and repeat the network test before accepting more calls.

STEP 5 · SUPPORT

Before you call support

Seven checks, in order. Note which one fixed the problem, or how far you got.

1. **Reload the page**
   Browser reload button

2. **Clear the cache and reload**
   Ctrl + Shift + R

3. **Close apps using the mic or camera**
   Other video calls, recorders, videos

4. **Log out and log back in**
   Closing the tab is not enough

5. **Try another workstation**
   Does it also happen on another computer?

6. **Try another account**
   Does it also happen to another agent?

7. **Restart the computer**
   Especially if it has been on for days



Still failing?

Generate the technical report
In Web ACD, open the account requirements and click “Generate report”. A TXT file is downloaded.

Send it to support
Together with the result of the seven checks.

Email support@ivrpowers.com
Help Center support.ivrpowers.com
Tel. ES +34 911 599 846
Tel. US +1 786 329 7177

STEP 6

Security

Seeing the customer is not the same as having identified them.

Verify their identity
following the procedure, even if you can see the customer

Never ask for passwords, PINs or codes
not by voice, not by chat, not on screen

When sharing your screen
only the window you need



STEP 7

Wrapping up

The close confirms what was agreed and keeps the case traceable.

Summarize what was done
and the next steps

Invite questions
“What other questions do you have?”

Thank them and mention the survey
if the service has one

Log it in Web ACD
before making yourself available again



REFERENCE

Phrases that work

They are not a script: they are ways of phrasing the moments when video calls for extra tact.

MOMENT	INSTEAD OF	TRY
You look away	(silence)	“I’m checking your file on the other screen, I’ll be right with you”
The lookup takes a while	“One moment”	“This takes about 30 seconds; meanwhile, let me tell you what I’m checking”
The connection fails	“Your internet is bad”	“It looks like the connection has dropped; let’s continue on audio”
You need to see something	“Show me that”	“Could you bring the document closer to the camera, facing the light?”
Checking it was understood	“Does that make sense?”	“To make sure I explained it well, what will you do first?”
Upset customer	“Calm down”	“I understand this has cost you time; let’s solve it now”
Closing	“Anything else?”	“What other questions do you have before we finish?”

BEFORE EVERY SHIFT

One-minute checklist

- Web ACD tester all green
- Only one session open
- Camera at eye level
- Correct service background
- Webphone green: ready
- Headset on and microphone tested
- Light in front, no window behind
- Notifications silenced

IntPowers

interactivepowers.com