

Rescheduling – Servicer can't Roll

Scenario: Review the order history: **Delivery scheduled for for tomorrow.** The servicer called and he isn't available due to a conflicting job. You were able to confirm an alternate date of next Tuesday with the servicer, but this will be the customer's second reschedule. The first was caused by back ordered equipment.

Agent:

1. Review the job history.
2. Call the customer.
3. Greeting:
 - a. *"Hello, this is (name) calling from CRST Home Solutions on behalf of (client). May I please speak with Mr./Mrs. (customer last name)?"*
 - b. *"Mr./Mrs. (customer last name), before we begin this call may be monitored or recorded for quality purposes."*
4. Verify the customer's full, service address with zip code.
5. Apologize and explain that unfortunately there is a scheduling conflict with their order, and we need to reschedule.
6. Offer the date that the servicer told you on the previous call, next Tuesday.
7. Use your customer service skills to de-escalate the call.
8. Book the order in DOLI for the agreed on date.
9. If the customer asks for compensation:
 - a. Advise the order has been escalated for coaching and process improvement
 - b. Ask if the customer is satisfied with the reschedule date.
 - c. If customer still wants compensation, advise that you will escalate to a member of management who will call the customer back to discuss compensation.
 - d. Open a Management Support Escalation.
10. Recap and close the call with the customer.
11. Notate in DOLI

Customer:

1. Greet the agent and verify the address information.
2. Explain that this is unacceptable because this is your second time having to reschedule and you really need range. You don't have a working stove to cook for your family.
3. Accept the date offered to you but explain that you want to be compensated for another reschedule.
4. Accept the compensation amount offered by the agent.