

Tech Needed Jobs

What makes a Tech Needed Jobs?

A job becomes a “Tech Needed” job when CRST Home Solutions does not have a confirmed service company to cover the job or to cover the job on the scheduled date. There are multiple ways a job becomes a Tech Needed job, including:

- CRST Home Solutions assigned the job to a service company, and they did not accept or decline the job within 12 hours (SLA rejected) (Status = Prescheduled, Comment = Rejected).
- CRST Home Solutions assigned the job to a service company, and they declined the job, either within the 1st 12 hours or by contacting CRST Home Solutions (Status = Prescheduled, Comment = Rejected).
- A service company declined the job after they accepted it by updating the status in DOLI (Status = Needs Installs Inc Action, Comment = Declining Job- see notes).
- Any job scheduled to A9668. These jobs are scheduled to a place holder service company and we need to find an active company to cover the job.
- Jobs that do not have a service provider in the area and the client doesn’t use ECB (9668) booking. These jobs immediately go to “Needs Installs Inc Action – Job Description Issue” status.

Tech Needed jobs will be identified by the “Market Manager Dashboard” report and also by requests for escalated jobs from our Resolutions Care or Damage Claims departments.

General Policies for Working Tech Needed Jobs

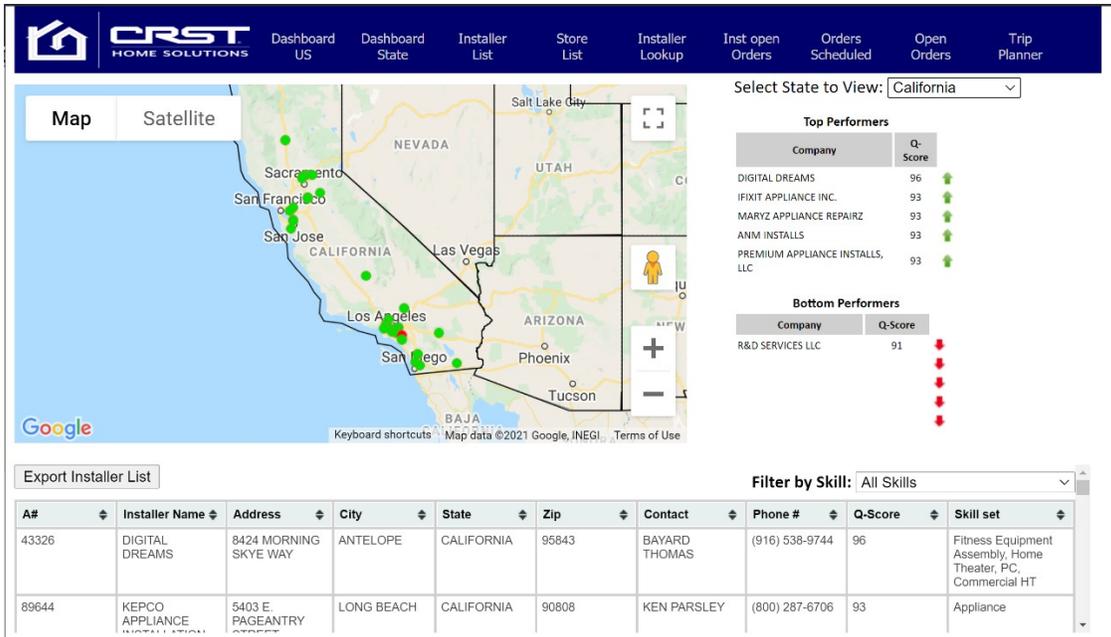
1. Every call, email, and text to do with finding coverage, must be notated in DOLI.
2. You should **only** be contact companies whose status is SMT is Active or Provisional
3. Always ask for alternate dates if a servicer cannot cover a job on the original date and time.

How to Find Coverage

When searching for job coverage, we will reach out to service companies in the customer’s area to ask if they can cover the customer’s order. Below is the process for searching for available service company options. Complete each step, and if you do not confirm coverage for the prescheduled or requested date/time, continue to the next step.

1. Review the DOLI Order History, Scope of Work, and Equipment on the order.
2. Go through the following methods to find a service company to cover the job.
 - Go to **StoreFile** and look up the **Client** and **Selling Store**.
 - i. Call each service company assigned to that store in turn and ask if they can cover the job.
 - ii. Notate each call in DOLI, include the A# of the service company and any alternate dates.
 - Click on the **Store Number** to open the store info screen. Then, click on **Work Order Log**. Review the past orders out of this store from newest at the bottom of the list to oldest at the top of the list. Check if there are any companies listed that we have not already contacted.

- i. Use SMT to confirm that any company we haven't spoken to is still in **Active** or **Provisional** status.
- ii. Call each service company assigned to that store in turn and ask if they can cover the job.
- iii. Notate each call in DOLI, include the A# of the service company and any alternate dates.
- Open **FM Dashboard** and go to **Dashboard State**. Choose the **customer's state** from the drop down. This will display all the servicers for the state along with their contact information and their skill sets.
 - i. Call each service company assigned to that store in turn and ask if they can cover the job.
 - ii. Notate each call in DOLI, include the A# of the service company and any alternate dates.



The screenshot shows the CRST HOME SOLUTIONS FM Dashboard. The top navigation bar includes: Dashboard US, Dashboard State, Installer List, Store List, Installer Lookup, Inst open Orders, Orders Scheduled, Open Orders, and Trip Planner. The main content area features a map of California with green dots indicating installer locations. To the right of the map, there is a dropdown menu for 'Select State to View:' set to 'California'. Below this, there are sections for 'Top Performers' and 'Bottom Performers' with their respective Q-Scores and green/red indicators. At the bottom, there is a table titled 'Export Installer List' with columns for A#, Installer Name, Address, City, State, Zip, Contact, Phone #, Q-Score, and Skill set.

A#	Installer Name	Address	City	State	Zip	Contact	Phone #	Q-Score	Skill set
43326	DIGITAL DREAMS	8424 MORNING SKYE WAY	ANTELOPE	CALIFORNIA	95843	BAYARD THOMAS	(916) 538-9744	96	Fitness Equipment Assembly, Home Theater, PC, Commercial HT
89644	KEPCO APPLIANCE	5403 E. PAGEANTRY	LONG BEACH	CALIFORNIA	90808	KEN PARSLEY	(800) 287-6706	93	Appliance

3. If you have not secured coverage by 4PM the customer's time, call the customer to reschedule their service appointment for an alternate date.
 - Offer either alternates you have confirmed with a service company or the next available date in DOLI.
 - If you have not found any company to cover the order for any date, reassign the order to 9668 and reschedule for the next available date.

Calling Service Companies for Coverage

When speaking with servicers asking for coverage, you should be sure to cover the information below.

1. Ask to speak to the authorized contact. This is our preferred person to speak to when requesting job coverage.
 - If a service company does not answer, leave a voicemail and send a follow up email from DOLI. Include the Job # and the originally scheduled date/time.
2. Provide the DOLI Job #, the client, and the type of service on the order.
3. Ask the servicer to cover the prescheduled date and time.
4. If the servicer says they cannot cover the original date/time, *ask for alternate availability* and notate those dates in DOLI.

5. If you are speaking to a servicer who is not assigned to the customer's Selling Store in StoreFile, verbally confirm the pickup location and the size and type of the equipment.
6. Notate every call in DOLI and send all emails for job coverage from DOLI.

Servicer can cover for the prescheduled date and time

If the servicer can cover the job for the original date and arrival window and does not ask for a trip charge, we can stop searching for coverage.

1. Advise the servicer that you will book the job to them and that you will accept it in DOLI.
2. Reassign the order to the new service company in DOLI
3. Use **Book Order** to schedule the job to the original date and arrival window.
 - a. Pay special attention that we are not changing the arrival window.
 - b. Choose "Installs inc - Reassigned service company, kept original date" as the Reschedule Reason.
 - c. You may force book the job if the date does not naturally populate.
 - i. Choose "Keeping Existing Appointment" as the Force Book Reason.
4. Accept the job by updating the job status to "Scheduled - (scheduled no comment)."
5. Notate in DOLI.

Servicer can cover the job for an alternate date and/or time

Please be smart regarding rescheduling customers, and use your soft skills, especially **empathy**, when rescheduling customers. Being rescheduled can be inconvenient and frustrating for customers; **always be polite, professional, and understanding when you speak with customers about reschedules.**

1. Advise the servicer that we will call them back if the job is reassigned to them for the alternate date.
2. Review the order and decide if the customer should be rescheduled.
 - o If the order is scheduled for the next day (tomorrow) and we have not secured coverage by 4 PM the day before the appointment, call the customer to reschedule for the alternate date and time.
 - o If we have contacted all available companies in the area and the Market Manager has confirmed there is no coverage for the scheduled date, we should call the customer to reschedule.
3. **If we need to reschedule, call the customer and advise that there was a scheduling conflict.**
4. Work with the customer to reschedule their order for an alternate date or time.
 - o If the customer does not answer, leave a voicemail and send a follow up email explaining that due to a scheduling conflict the customer's order has been rescheduled for the new date and time. Provide the appropriate call back information and hours of operation.
5. Call and advise the servicer that you are booking the job to them and accepting it for them in DOLI.
6. Reassign the order to the new service company in DOLI
7. Use **Book Order** to schedule the job to the original date and arrival window.
 - o Pay special attention that we are not changing the arrival window.
 - o Choose "Installs inc - Reassigned service company, kept original date" as the Reschedule Reason.
 - o You may force book the job if the date does not naturally populate. Choose "Keeping Existing Appointment" as the Force Book Reason.
8. Accept the job by updating the job status to "Scheduled - (scheduled no comment)."
9. Notate in DOLI.

Servicer can accept the job with a trip charge

If a servicer is able to cover the job for the original scheduled date or an alternate date with a trip charge, we will follow the process below.

1. Negotiate the trip charge as appropriate and per our standard Trip Charge policies.
2. Advise the servicer that you will call them back if the fee is approved and the job booked to them.
3. Notate the call, including the trip charge, request in DOLI.
4. Continue calling other possible coverage options. Notate all calls in DOLI.
5. Once you have called all options, determine if any of the service companies who requested a trip charge is the best choice to cover this job.
 - o A good fit will balance our desire to avoid reschedules with the desire to reduce trip charges. Use your best judgement and your knowledge of the market.
6. Based on the amount, seek management approval for the chosen trip charge.
 - o Market Managers may approve up to \$149 dollars and below.
 - o Any requests for \$150 or more need to be referred to Kirk Rydzynski and Robb Bishop.
7. Enter the approved trip charge into the Trip Charge Info tool in DOLI.
8. Call and advise the servicer that you will book the job to them, and that you will accept it in DOLI.
9. Reassign the order to the new service company in DOLI
10. Use Book Order to schedule the job to the original date and arrival window.
 - o Pay special attention that we are not changing the arrival window.
 - o Choose "Installs inc - Reassigned service company, kept original date" as the Reschedule Reason.
 - o You may force book the job if the date does not naturally populate - Choose "Keeping Existing Appointment" as the Force Book Reason.
11. If we are changing the scheduled date and/or the arrival window, **the Market Manager must call the customer to confirm the new appointment.**
 - o If the customer does not answer, leave a voicemail and send a follow up email explaining that due to a scheduling conflict the customer's order has been rescheduled for the new date and time. Provide the appropriate call back information and hours of operation.
12. Accept the job by updating the job status to "Scheduled - (scheduled no comment)."
13. Notate in DOLI.

If we are unable to confirm coverage

There are times where we are unable to confirm coverage for any appointment date by 4 PM the day before the original appointment. In these cases, we will reschedule the customer so that we may continue to work to find coverage.

1. Reassign the job to **9668** in DOLI.
2. Call the customer to reschedule. Apologize and explain that **due to a scheduling conflict** we will need to reschedule their order. **Do not tell the customer that we don't have a servicer to perform their job.**
3. Offer the customer the first available date that is showing in DOLI for A9668.
4. Book the job in DOLI.

- If no dates are displayed in DOLI, force-book the order three days in the future: no Saturdays, Sundays, or Holidays.
5. Thank the customer for their flexibility and apologize again for any inconvenience this may cause.
 6. Close the call and notate in DOLI.

Note: The job will be included on tomorrow's Tech Needed report to be worked again. Do not tell the customer there is no servicer assigned to the job for the new date they agreed to.

SLA Rejected Orders

Service companies have 12 hours to accept or reject the job after a job is assigned to them in DOLI. If the servicer does not update the job in that first 12 hours, DOLI will SLA reject the job. This means the servicer has neither accepted nor rejected the job.

SLA rejected jobs that are scheduled for *5 or more day in the future*, may be rebooked to the assigned service company assigned for the original date/time **one time** without contacting that company.

If it is less than 4 days out **or** if the job has previously SLA rejected one or more times, the assigned service company must be contacted. We will need to receive approval to book the job back for the original date/time or job needs to be worked to find alternate coverage.

Outbound Call Scripts

Note: When calling out to the customer, it is required to use the outbound call disclaimer ("This call may be recorded for quality and training purposes").

Live Servicer Answer

- "Hello. This is **[Your Name]** from CRST Home Solutions. Is **[authorized contact]** available?
- "I am contacting you regarding Job# **[Job#]**. This job is a **[client / type of service]** located in **[City, State of Job#]**. The customer is scheduled for **[Scheduled Date/Time]**. Are you able to accept the job for this date and time?"
- If the servicer cannot cover the Scheduled Date/Time, ALWAYS ask: "What are some alternate dates that you would be available to take this job?"

Leaving Voicemail for Servicer

“Hello. This is [Name of Agent] from CRST Home Solutions. I am contacting you regarding Job# [redacted]. This job is a [client / type of service] located in [City, State of Job#]. The customer is scheduled for [Scheduled Date/Time]. Please call us back to discuss your availability within the next 2 hours at 1-888-490-4321.”

- Follow up by sending an email to the servicer from DOLI

Alternate Coverage Found – Live Customer Answer

- “Hello. This is [name] from CRST Home Solutions. We are contacting you regarding your [client / type of service] through [client]. May I please speak with [customer name]?”
- “Unfortunately, there was as scheduling conflict, and we need to reschedule your appointment. However, we do have a servicer available for [alternate date/time confirmed with servicer]. I am sorry for any inconvenience, but is this a date and time that you would be available?”
- After recap: “Thank you for understanding. I am sorry for any inconvenience, and I appreciate your flexibility in rescheduling. Is there anything else I can do for you today?”
- Next steps:
 - Book the order in DOLI
 - Call the servicer to confirm the order has been booked to them
 - Accept the job by updating the job status to “Scheduled – (scheduled no comment)”
 - Notate in DOLI

Alternate Coverage Found – Leaving Voicemail for Customer

- “Hello. This is [name] from CRST Home Solutions. We are contacting you regarding your [client / type of service] through [client]. Unfortunately, there was as scheduling conflict and we need to reschedule your appointment. The new appointment is scheduled for [alternate date/time confirmed with servicer]. If this is in any way inconvenient, please call back to confirm your availability at [client phone number listed in DOLI]. Thank you for your patience and have a nice day.”
- Next steps:
 - Book the order in DOLI
 - Call the servicer to confirm the order has been booked to them
 - Accept the job by updating the job status to “Scheduled – (scheduled no comment)”
 - Notate in DOLI

No Coverage Found – Live Customer Answer

- Reassign the job to A9668 and click Book Order in DOLI.
- “Hello. This is [name] from CRST Home Solutions. We are contacting you regarding your [client / type of service] through [client]. May I please speak with [customer name]?”
- “Unfortunately, there was as scheduling conflict and we need to reschedule your appointment. I’m very sorry that we are unable to keep your appointment, but I would like to help you schedule a new one. Do you have a moment to reschedule your service?”

- Offer the customer the first available date that is showing in DOLI for A9668. Book the job. If no dates are displayed in DOLI, force-book the order three days out.
- After recap: **“Thank you for understanding. I am sorry for any inconvenience, and I appreciate your flexibility in rescheduling.”**
- Next steps:
 - Book the order in DOLI
 - Notate in DOLI
 - This order will be on the next Tech Needs report and will need to be worked again as a Tech Needed job.

No Coverage Found – Leaving Voicemail for Customer

- **“Hello. This is [name] from CRST Home Solutions. We are contacting you regarding your [client / type of service] through [client]. Unfortunately, there was a scheduling conflict, and we need to reschedule your appointment. The new appointment is scheduled for [alternate date/time confirmed with servicer]. If this is in any way inconvenient, please call back to confirm your availability at [client phone number listed in DOLI]. Thank you for your patience and have a nice day.”**
- Book the order to the first available date that is showing in DOLI for A9668. If no dates are displayed in DOLI, force-book the order three days out.