

WORKING FIELD MANAGEMENT SUPPORT ESCALATIONS

There are times where a customer refuses our attempt to reschedule their appointment. When this happens, we use the Field Management Support escalation to prompt our Field Leadership to find alternate coverage. This escalation adds the order to the Tech Needed list and also opens a ticket in Request Tracker, to ensure the issue is seen by all parties.

CRST Home Solutions are responsible for performing the following actions to find a service provider who can complete the customer's service as scheduled:

1. Use the "Zip to Market Manager to Region" lookup to determine if there is a Market Manager for the customer's area.
 - a. **Yes – Market Manager**
 - i. If the assigned servicer has not already been contacted, call the assigned servicer and ask if they can cover the job on the customer's requested date/time.
 - ii. If the assigned servicer has already been contacted or is not reachable, email the Market Manager and request assistance locating coverage for the customer.
 1. If the customer is highly escalated, or multiple contacts have resulted in no progress, agents may call the Market Manager before emailing.
 - iii. If necessary, call the customer back
 - iv. Advise that we are working to find alternate coverage for their job.
 - v. Set a follow up time with the customer.
 - vi. Call the customer back at either the follow up time set on the 1st call or when you receive a response from the Market Manager (whichever happens 1st)
 - vii. Document all calls and emails in DOLI.
 - viii. Do not close out the Field Management Support Escalation until the job is completed.
 - b. **No – Market Manager**
 - i. Use StoreFile to identify the Primary, Secondary, and Tertiary provider for the selling store. Follow the Tech Needed Process to locate alternate cover.
 - ii. Call each company and ask if they are able to cover the job for the customer's preferred date/time.
 1. Note: When contacting service providers, stress that this is a high priority job that you are trying to get covered, and that we really want to get the customer taken care of.
 - iii. If you do not find alternate coverage, reach out to the Market Manager for coverage assistance.
 - iv. **After working the job for no more than 15 minutes, call the customer to update them on your progress, no matter what the status update** (e.g., let the customer know you are still working on finding a service provider; let the customer know that you are awaiting response to voicemails you left for service providers).
 1. If you spoke with a service provider who confirmed that they could cover the job on a different date, offer to reschedule the customer's service to this date. If the customer accepts, reschedule the job and book it to the service provider who offered the alternate availability.
 - v. Call the customer back at either the follow up time set on the 1st call or when you receive a response from the Market Manager (whichever happens 1st)
 - vi. Document all communications with the customer in DOLI. Document all communications with service providers in DOLI.
 - vii. Do not close out the Field Management Support Escalation until the job is completed.