

Site Not Ready Role Play

DIRECTIONS

1. The trainer will give each person a phone number to work on during the role play. Agents will provide the phone number to their partner during the call.
2. When playing the Agent, trainees must perform all verbally interactions with the customer, all order updates in the computer, and notate the call in DOLI.

Site Not Ready – Customer Calling

Read the following steps for the customer and agent. The instructor will give each person a phone number (or DOLI Job number). This will be the # used when it is your turn to be the customer in the role play.

Agent:

1. Use Proper Greeting
2. Pull up the order in DOLI
3. Verify: Servicer – Name on Order
4. Gather the issue the customer is having.
 - a. Ask the servicer when we can come back out to perform the service.
 - b. Ask if the servicer left any equipment onsite.
 - c. Ask the customer is any work was performed by the servicer today.
5. Press **Edit Order**
6. Change the status of the order to **Waiting Customer Action**
7. Change the comment to **Customer Requests Delay**
8. Set the **Delay Date** to 7 days in the future
9. Press **Submit**
10. Recap
11. Close the call
12. Notate in DOLI. Be sure to include the details you gathered in 4a through 4c in your notations.

Customer:

1. Call CRST
2. DOLI number: _____
3. Customer Name: _____
4. **Inform the agent you are onsite but are unable to complete the service because the customer's carpets are not finished being installed.**
5. The customer will call back to reschedule when the carpets are done.
6. No work was performed
7. You are taking all product back to the pickup