

Service Call Closeout 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.

Service Call Closeout

Agent:

1. Greet the caller and pull up the order.
2. Ask the servicer to verify the customer's name on the order.
3. Ask what you can do to help.
4. Ask the servicer why the troubleshoot issue isn't related to the original installation. Get as many details as possible.
5. Use Edit Order > Edit Multiple SKUs to ADD the Service Call SKU and THEN cancel the Troubleshoot SKU
6. Advise the servicer that have updated the order.
7. Recap and close the call
8. Notate every conversation and all details on the job in DOLI. **Include ALL work performed onsite**

Servicer:

1. Greet and provide the DOLI job number.
2. Verify customer information.
3. Explain that you just finished a troubleshoot that wasn't related to the installation and you would like to be paid.
4. Explain that you went out and the customer was having an issue with the product dropping off the Wi-Fi. You confirmed the Wi-Fi signal is too weak to maintain a connection
5. This is not part of the scope of work because you did not install the Wi-Fi and you advised the customer of this and they do not want to move the thermostat.