

CRST/IKEA Role-plays

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Scheduling

Scenario: Customer calls in to schedule their delivery appointment

Agent:

1. Greeting
2. Ask for the customer's phone number
3. Search in LMP for the order
4. Ask the caller to confirm the name and delivery address on the order
5. Pull up the Days of Service sheet
6. Go to the tab to the customer's market
7. Search by the customer's zip code
8. Offer the customer the next available day of service
9. In Schedule, click on Edit
10. Chose the Requested By
11. Click on the customer's chosen date
12. Advise the caller that they will receive a call the day before the scheduled date to provide a 4-hour arrival window.
13. Recap
14. Closing
15. Document in Notes

Caller:

1. Customer phone number: _____
2. Customer Name: _____
3. Delivery Address: 24 Letts Circle, Monroe, NY, 10950
4. Tell the agent that you would like to schedule your IKEA delivery appointment.
5. Accept the first date offered to you.

Same Day Reschedule

Scenario: Customer has an appointment for later today, but has a personal emergency and needs to reschedule.

Agent:

1. Greeting
2. Ask for the customer's phone number
3. Search in LMP for the order
4. Ask the caller to confirm the name and delivery address on the order
5. Advise the customer that you will update our driver not to perform the delivery today.
6. Advise the customer that because the items are in transit the customer will need to speak to IKEA to set a new appointment date.
7. Recap and close the call
8. Call IKEA and request a SAMs case number
9. Call the driver and advise not to roll on the job
10. In **Dispatch**, click on **Edit**
11. Enter a note in the **Failed Reason** field
12. From Delivery Failed drop down, choose "**Rescheduled while driver enroute**"
13. Click **Save**
14. A new RST order will be created.
15. Document in **Notes on the RST order**.

Caller:

1. Customer phone number : _____
2. Customer Name: _____
3. Delivery Address: 24 Letts Circle Monroe, NY, 10950
4. Tell the agent that you are scheduled for today, but a person emergency came up and you will need to reschedule.
5. As the IKEA Rep, ask for the customer's name and order number. Provide case # 492960
6. As the driver, ask for the customer's name and stop number. Agree not to roll on the job.

ETA

Scenario: Customer calling in because they were scheduled for 9-1 and would like an updated arrival time.

Agent:

1. Greeting
2. Ask for the customer's phone number
3. Search in LMP for the order
4. Ask the caller to confirm the name and delivery address on the order
5. Ask the caller to confirm the customer's delivery address
6. Check arrival time in LMP and provide to customer
7. Place caller on hold
8. Call driver for an updated arrival time
9. Ask the driver for an updated time and provide to customer
10. Provide the customer with the updated ETA.
11. Recap
12. Closing:
13. Document in Notes

Caller:

1. Customer Last Name: _____
2. Delivery Address: 24 Letts Circle Monroe, NY, 10950
3. Tell the agent that would like an updated arrival time. The order was scheduled 9-1 and you haven't heard from the driver yet.

Customer Not Home

Scenario: Driver calling because the customer isn't answering the door and appears to not be home for the appointment.

Agent:

1. Greeting
2. Ask for the order number
3. Ask the caller to verify the customer's name
4. Call the customer
5. Leave a message advising the customer to call IKEA to reschedule. Provide the appropriate IKEA contact number for the customer.
6. Call IKEA and explain the situation
7. Ask for a SAMs case number. **Note:** This must be in your notes and given to the driver.
8. Provide the SAMs case number to driver. Advise him to add to his door tag and notate the case number on his paperwork.
9. In **Dispatch**, click on **Edit**
10. Enter a note in the **Failed Reason** field
11. From **Delivery Failed** drop down, choose "**Not at home**"
12. Click **Save**
13. Recap and close the call
14. Document in Notes

Caller:

1. Order Number: _____
2. Customer Last Name: _____
3. Delivery Address: 561 Main St Franklin, NJ, 07416
4. Explain to the agent that you are at the customer's home and it appears there isn't anyone home.

Missing Equipment at Pickup

If the driver calls and reports that the product is not available when they arrive at the pickup location.

Agent:

1. Greeting
2. Ask for the order number
3. Ask the caller to verify the customer's name
4. Ask the driver for the article #'s for any items that are missing.
5. Ask to place the driver on hold while you contact the customer.
6. Call the customer and advise that some items are damaged at the pickup location.
7. Ask if the customer is alright with a partial delivery.
8. Advise the customer we will contact them when we know when the remaining items will be available. (Roughly 24-48 hours).
9. Confirm the customer's appointment time for today.
10. Recap and end the call with the customer
11. Return to the driver and inform that they can roll on the job as scheduled.
12. Recap and end call with the driver.
13. Call IKEA and request a SAMs case number. You will need to include this in your notes.
14. Email the warehouse alias, Market Manager, and the NJ call center to request a warehouse search for product location or proof of delivery (POD).
 - a. Use email address training@crst.com
15. Notate all calls and emails in LMP. Include the SAMs case number and the article numbers of the damaged items.
16. Copy your emails into the Notes section of LMP

Caller:

1. Order Number: _____
2. Customer Last Name: _____
3. Delivery Address: 24 Letts Circle, Monroe, NY, 10950
4. Explain to the agent that you are at the pickup location and one of the customer's items is missing.
5. Provide Article # 9282
6. As the customer, agree to the partial delivery.

Extra Equipment at Customer's Home

Scenario: Driver calls from customer's home to report that there are extra items in the shipment.

Agent:

1. Greeting
2. Ask for the order number
3. Ask the caller to verify the customer's name
4. Ask if the items have the correct customer's name on them.
5. Advise the driver to return the items to the pickup location.
6. Recap
7. Closing
8. Call IKEA and request a SAMs case number
9. Notate in LMP, include the details of the extra items and the SAMs case number.

Caller:

1. Order Number: _____
2. Customer Last Name: _____
3. Delivery Address: 24 Letts Circle, Monroe, NY, 10950
4. Explain to the agent that you are at the customer's home and there are three extra boxes.
5. The items do have the customer's name on them.