

# Servicer Caused Same Day Reschedule Role Play

## DIRECTIONS

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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.

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### Agent:

1. Review the job history.
2. Call the customer.
3. Greeting:
  - a. *"Hello, this is (name) calling from CRST Home Solutions on behalf of (client). May I please speak with Mr./Mrs. (customer last name)?"*
  - b. *"Mr./Mrs. (customer last name), before we begin this call may be monitored or recorded for quality purposes."*
4. Verify the customer's full, service address with zip code.
5. Apologize and explain that unfortunately there is a scheduling conflict with their order, and we need to reschedule.
6. Offer the date that the servicer told you on the previous call, next Tuesday.
7. Use your customer service skills to de-escalate the call.
8. If the customer refuses to reschedule, open a Field Management Support Escalation
  - a. Set a Call back time
  - b. Email MM at [training@nalgrou.com](mailto:training@nalgrou.com)**
9. Recap and close the call with the customer.
10. Notate in DOLI

### Customer:

1. Greet the agent and verify the address information.
2. Explain that this is unacceptable because this is your second time having to reschedule and you really need this mattress. You have been sleeping the floor. You took today off from work.
3. Refuse to reschedule because you need this mattress today. You cannot wait to have the this done another day.