

# Order Escalations

## Purpose

Order escalations in DOLI bring attention to jobs:

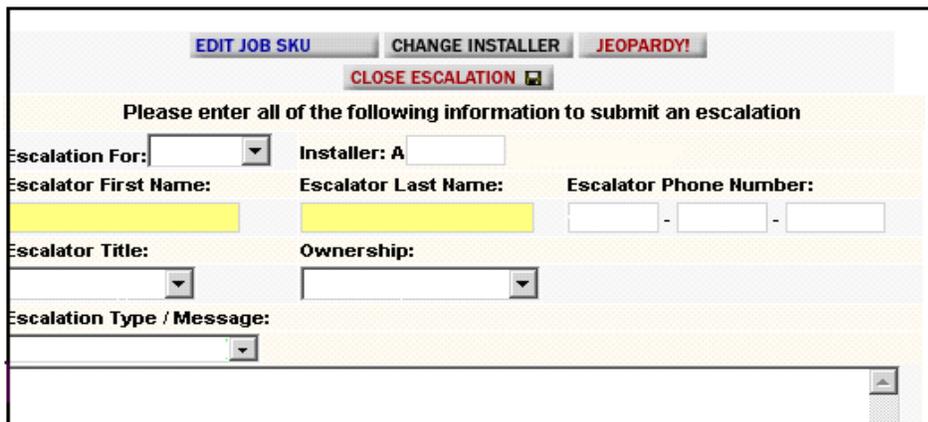
- When a customer is not completely satisfied
  - This includes when a customer has a troubleshoot within 2 weeks of original installation.
- To communicate to the field that an CRST HOME SOLUTIONS process has not been followed.
- To track issues for overall management and improvement of the business.

## When can an Escalation be Opened?

- A customer or client reports they are less than completely satisfied with any services.
- CRST HOME SOLUTIONS or team member believes that a process has not been followed by a field servicer.

## Opening an Escalation in DOLI

1. Click on the **Edit Order** button in DOLI.
2. Click on **Open Escalation**.
3. Complete the fields on the escalation form:



The screenshot shows a web form for opening an escalation. At the top, there are three buttons: 'EDIT JOB SKU' (blue), 'CHANGE INSTALLER' (grey), and 'JEOPARDY!' (red). Below these is a 'CLOSE ESCALATION' button with a trash icon. The form title is 'Please enter all of the following information to submit an escalation'. The fields are: 'Escalation For:' (dropdown), 'Installer: A#' (text), 'Escalator First Name:' (text), 'Escalator Last Name:' (text), 'Escalator Phone Number:' (text with hyphens), 'Escalator Title:' (dropdown), 'Ownership:' (dropdown), 'Escalation Type / Message:' (dropdown), and a large text area for the message.

- **Escalation For** – Select the party who appears to be responsible for the issue, Installer or Client.
- **Installer A#** – Enter the A# of the service company for who the escalation is intended (can be different than currently assigned installer). If you selected **Client** from the **Escalation For** list, then enter the current Installer A#.
- **Escalator contact information** – Enter the name and phone number of the person who made CRST HOME SOLUTIONS aware of the issue. This is the person to be contacted at the end of the process to see if satisfied.
- **Escalator Title** – Select who is alerting CRST HOME SOLUTIONS of the situation; client, customer, installer, or CRST HOME SOLUTIONS
- **Ownership** – Select Client Services for installer and client escalations.
  - Select **Install Support** for “Field Management Support” and “Customer Requests Sooner Date” escalations. Both require **Escalation For: Installs**.
- **Escalation Type** – Select an appropriate escalation type for the situation, See the “Escalations Types” later ins this document.
- **Message** – Type the details of the situation; please be specific about **WHY** you are opening the escalation.
- Click **Submit**.

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Servicer

## Escalation Types

All Escalations marked with **(A)** are automatically closed by the system.

### Servicer Escalations (Ownership = Client Services)

- **Didn't Update Job Status After Installation:** The servicer does not follow an CRST Home Solutions policy by failing to update the job status of the job. **(A)**
- **Services not Complete or Below Standard:** The servicer did not complete the installation to the customer's satisfaction.
- **Fire Reported** – Used when a fire is reported on site by either the servicer or the customer/client.
- **Leak Reported – Gas** – Use this escalation any time the customer reports leak of gas, propane, or natural gas.
- **Leak Reported – Water** – Use this escalation type any time the customer reports leaking water.
- **Missed Appointment:** CRST Home Solutions receives notification on the day of the appointment that the servicer fails or is unable to arrive for the scheduled arrival window. **(A)**
- **Didn't Provide an Appointment Window or ETA:** This escalation is used when the servicer did not call to provide an ETA more than 30 minutes before the end of the arrival window or did not provide a 3-hour window and/or log the attempt in DOLI by 7 AM local time the day to the appointment where appropriate. **(A)**
- **Didn't Notify Installs for Job Exception:** Used when the servicer did not inform CRST Home Solutions of any exception issues that affected the job. Examples include all onsite and product issues, scheduling conflicts, or upsells. **(A)**
- **Unprofessional Behavior/Dress Code/Vehicle:** Servicer does not behave in a professional manner or he is not appropriately dressed or does not have appropriate ID, or he does not have an appropriate vehicle for the job. **(A)**
- **Damage to Customer Property/Product:** A customer or client alerts CRST Home Solutions to an issue where they believe our servicer has caused some type of physical damage to the customer's property. Worked by Damage Claims.
- **Damaged in Transit:** CRST Home Solutions receives notification that the servicer has damaged product(s) while in route to an installation site. Worked by Damage Claims.
- **Product Location Unknown:** The servicer fails to return the product or update CRST Home Solutions regarding returning the product or leaving the product on-site or the servicer lost/never returned product(s).
- **Theft Report:** Used when the customer reports that the servicer stole from him/her home. Worked by Damage Claims.

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- **Theft Report (legal):** Used when the customer reports that the servicer stole from him/her home and the customer has contacted attorneys have been involved. Worked by Damage Claims.
- **Personal Injury Incident:** CRST Home Solutions is notified that our servicer's installation/actions caused personal injury to someone at the location where the installation took place. Worked by Damage Claims.
- **Failure to Upload Proper Documents:** Automatically opened when the servicer fails to upload the signed work order, pick-up form, or any paperwork necessary to close out the order. RC Agent – do not use this escalation.
- **Store Servicer Rejected Job:** Automatically opened and closed when the store primary rejects a job. (A)

### Installs Escalations (Ownership = Installs Support)

- **Field Management Support:** Used when a servicer cannot work an order as scheduled, but the customer does not or cannot reschedule. Phone 2 and Back Office will work in real-time. Market Managers will take over if not able to resolve.
- **Management Support Escalation:** This escalation is used to bring customer requests for compensation to the attention of management, who will resolve with the customer after the service is completed.
- **Customer Requests Sooner Date:** Opened any time a customer or client requests a sooner date than what we have available. DOLI will close this escalation automatically. (A)

### Client Escalations (Ownership = Client Services)

- **Product Issue:** Any client provided product is reported as damaged, defective, wrong, or missing parts. (A)
- **Client Caused Service Issue:** The client created an issue that affected the service. (A)
- **Wait-Time at Pickup Locations:** This escalation occurs when the servicer experiences a wait-time that is 30 minutes or longer at the pickup location. Phone 1 will only use this escalation if on hold with IST for 30+ minutes. (A)
- **Client Caused Scheduling Issue:** The store creates a scheduling conflict by scheduling the order outside of CRST Home Solutions' scheduling policies or without verifying with a servicer or CRST Home Solutions to confirm the scheduled date. (A)
- **Customer Unhappy with Store Experience:** The servicer or customer calls to report the dissatisfaction with the store/client. (A)