

Resolving an Escalation: Field Management Support Follow-up

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.

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Agent:

1. This is the e-mail response you received from the market manager later in the afternoon on the same day:
*“Hello,
I followed through on this request, but we don’t have any alternative coverage for this customer’s requested date. Please update the customer and the order accordingly.
Thank you,
Robb”*
2. Pull up the order in DOLI and prepare a plan before calling the customer to update him.
3. Call the customer and use the appropriate outbound 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. You don’t need to verify with the customer in this instance because you already spoke with the customer that same day.
5. Apologize to the customer and explain that unfortunately we were not able to find alternative coverage for tomorrow/the customer’s original scheduled date.
6. Use your customer service skills to de-escalate the customer. Use empathy to relate to the customer’s complaints as well.
7. If the customer asks for compensation:
 - a. Advise that you will escalation the customer’s compensation request to management and the customer will receive a call back.
 - b. Open a Management Support Escalation
8. Book the customer for the first available date that populates in the system that the customer agrees to take.
9. Recap and close the call.
10. Notate the order accordingly.
 - a. If you gave the customer compensation, make sure you notate that you entered it into DOMs.

Customer:

1. Greet the agent and thank them for calling you back with an update.
2. You become frustrated with the lack of alternative coverage because you were promised the original date. You're having people over to your home next weekend and you needed your product to be installed before that party so you could use it when they were there. Now you're going to have to try to figure out some other way to feed everyone.
3. Tell the agent that you expect some form of compensation for this experience.
4. Accept the date that the agent gives you on the phone.