

Customer Refuses to Reschedule

There are several situations where CRST Home Solutions will ask the customer to reschedule their appointment, such as when a servicer is unable to perform the work on the scheduled date. At times, customers are unwilling or unable to change their scheduled date. A “Field Management Support” escalation is used to signal Field Leadership that a job requires immediate coverage to meet the customer’s expectations.

- If a job is scheduled for today or tomorrow (same day or next day) and when asked to reschedule, the customer refuses to accept a reschedule date.
- If this is the 2nd missed appointment.

Many of these calls come to us as an ETA request. When we reach out to the servicer, we may be asked to reschedule the customer or we may not be able to reach the servicer, prompting CRST Home Solutions to attempt to reschedule the customer.

Customer Refuses to Reschedule Process

1. If you have not already done so, determine why the order is being reschedule and when is the next soonest, date the order can be performed. This may require calling the assigned servicer.
2. Speak with the customer attempt to reschedule for any of the available dates in DOLI or provided by the servicer. *You may offer multiple dates to try to assist the customer*
3. If the customer cannot/will not accept any of the available dates, advise the customer that we will look for alternate coverage, and let the customer know we will contact them back with an update.
 - a. Agents are required to set a call back time with the customer. You will contact the customer when field leadership responds to our request, or by the call back time (whichever is first).
4. **Change the job status to “Prescheduled – Rejected.”**
5. Open a Field Management Support Escalation:
 - **Escalation for:** “Installs Inc.”
 - **Installer’s A#:** Enter servicer’s A number
 - **Escalator’s First Name:** “Enter the customer’s name”

- **Escalator's Last Name:** "Enter the customer's last name"
- **Escalator's Phone Number:** "Enter the customer's phone number"
- **Escalator Title:** "Customer"
- **Ownership:** "Install Support"
- **Escalation Type:** "Field Management Support"
- **Notes:** Describe the customer's preferred schedule date, why the order needs to be rescheduled, and any compensation requests.

The Market Manager will take ownership of finding a servicer to cover job.