

## 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. The partner playing the Agent will not pull up the order. **AGENTS SHOULD WORK ON THEIR OWN CUSTOMER PHONE NUMBER!**
3. When playing the Agent, trainees must preform all verbally interactions with the customer, all order updates in the computer, and notate the call in DOLI.

## MISSED APPOINTMENT

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### Customer:

1. Call into CRST Home Solutions. When asked, provide your phone number
2. When asked, verify the address (241 Main St. Harrisburg, PA 17112) and customer name.
3. Inform the agent that you are scheduled for today, the servicer hasn't arrived yet, and you're not sure when he was supposed to arrive.
4. When asked by the agent, you received a call the night before, but you don't remember the window given.
5. When the agent asks you if you can wait while he/she calls the servicer for a new ETA, say yes.
6. Accept the new ETA that the agent offers you.

### Agent:

1. Use the client appropriate greeting/branding
2. Ask for the **phone number** and pull up the order
3. Ask the caller to verify the **full service-address** and **name** on the order
4. Ask how you can assist the caller.
5. **Check Get Dates for a 3-hour Arrival Window**
6. Ask the customer if he/she ever received a call with an arrival window.
7. Apologize to the customer and offer to call the servicer to get an updated ETA.
8. Ask the customer if they would like to wait if the servicer is able to come out later that day.
9. Use the proper hold procedure to put the customer on hold.
10. Pretend to call the servicer. Pretend that the servicer can come out at 5 p.m. today.
11. Return to the customer and thank him/her for holding.
12. Provide the new ETA to the customer and ask them if the time is good for them.
13. Recap and close the call.
14. Open a **Missed Appointment Escalation for "Installer"** on the order in DOLI.
15. Notate the order in DOLI, include the