

INSTRUCTIONS

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.

SCHEDULING IN DOLI WITH NO DATES POPULATING

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.
4. Explain that your cable will not be installed until tomorrow, and that the cable is necessary in order to complete the installation service, so the order needs rescheduled
5. Accept the 1st date the agent offers

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. Click **Book Order** – No dates will populate in the system
6. Click **Force Date/Time**
7. Use the No Dates in DOLI process to offer the customer a date an available date (3 or more days in the future, no Saturdays, no Sundays, or Holidays).
8. Select a servicer from the **Technician drop-down** (For HT orders only)
9. Select the **appropriate date** from the drop-down boxes.
10. Offer the customer an **arrival window** from the drop-down boxes.
11. If prompted, ask for and enter the customer's email
12. Choose the appropriate **Reschedule Reasons** from the drop downs

13. Click **Accept Booking**
14. Recap the call
15. Use a client-appropriate closing
16. Notate in DOLI