

## 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.

## SCHEDULING/RESCHEDULING AN ORDER IN DOLI

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### Customer:

- Call into CRST Home Solutions – tell the agent that answers that you need to schedule/reschedule your order for a TV installation.
- When asked, provide the address (241 Main Street Harrisburg, PA 17112) and name on the order.
- Accept the first date that the RC agent offers.

### Agent:

1. Use the client appropriate greeting/branding
2. Ask for customer's **phone number** to pull up the order
3. Ask the caller to verify the full, **service** address and **name** on the order
4. Ask how you may help the caller
5. **Book Order** - offer 1<sup>st</sup> available date and arrival window
6. Press **Book/Rebook**
7. If prompted, ask for an email and enter in DOLI
8. If prompted, choose the appropriate Reschedule Reason drop downs
9. Press **Accept Booking**
10. Recap
11. Use a client appropriate closing
12. Notate in DOLI