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. 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.

CUSTOMER REQUESTS SOONER DATES

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 need to schedule your dishwasher installation.
4. Explain that you need a soon appointment because you will be out of town.
5. You need an appointment for tomorrow or the next day because you will be out of town for two weeks after that.
6. Agree to be placed on hold.
7. Accept the offered date.

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**
6. Offer the customer the first available appointment (It will be refused)
7. Ask the customer how soon they need to be scheduled
8. Offer to call the servicer for a sooner date
9. Ask to place the caller on hold
10. Pretend to call the servicer. There will be no answer; pretend to leave a voicemail.

11. Return to the customer and explain that at this time we do not have anything sooner available

12. Ask the customer when they will be back in town

13. Offer to schedule the customer for an available date after the customer will return
    a. If prompted, ask for an email and enter in DOLI

14. Recap the scheduled date and let the customer know we will call if their preferred appointment becomes available

15. Close the call

16. Notate in DOLI.

17. Email the **training@crst.com** to ask the servicer to meet the customer's preferred date(s)

18. Open a "Customer Requests Sooner Date" escalation
    a. Escalation For: Installs inc.