

Order Escalations

PURPOSE

Order escalations in DOLI bring attention to jobs:

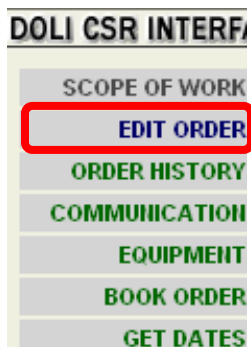
- When a customer is not completely satisfied.
- To communicate to the field that an Installs process has not been followed.
- To track issues for overall management and improvement of the business.

WHEN CAN AN ESCALATION BE OPENED?

- A customer or client reports they are less than completely satisfied with any services.
- CRST Home Solutions or team member believes that a process has not been followed by a field servicer.

OPENING AN ESCALATION IN DOLI

1. Click on the **Edit Order** button in DOLI.



2. Click on **Open Escalation**.

Order Escalations

EDIT JOB SKU EDIT MULTIPLE SKUS CHANGE INSTALLER CHANGE STATUS

OPEN ESCALATION CLOSE ESCALATION JEOPARDY!

Current Status: Completed > Complete per Installer

Change Status:

The Scheduled status is not available here. In order to schedule this job, please use Book Order.

Add / Edit Notes : (Notes entered here will not appear on the printed workorder.)

Account #: 2142049

SUBMIT ✓

EDIT JOB SKU CHANGE INSTALLER JEOPARDY!

CLOSE ESCALATION

Please enter all of the following information to submit an escalation

Escalation For: Installer: A

Escalator First Name: Escalator Last Name: Escalator Phone Number: - -

Escalator Title: Ownership:

Escalation Type / Message:

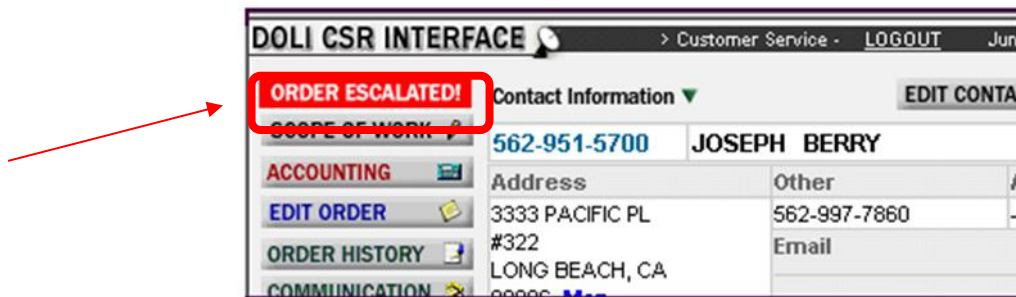
3. Complete the fields on the escalation form:

- **Escalation For** – Select the party who appears to be responsible for the issue, Installer or Client.
- **Installer A#** – Enter the A# of the service company for who the escalation is intended (can be different than currently assigned servicer). If you selected **Client** from the **Escalation For** list, then enter the current Servicer A#.
- **Escalator contact information** – Enter the name and phone number of the person who made CRST Home Solutions aware of the issue. This is the person to be contacted at the end of the process to see if satisfied.
- **Escalator Title** – Select who is alerting CRST Home Solutions of the situation; client, customer, installer, or Installs (CRST Home Solutions).
- **Ownership** – Select Client Services for installer and client escalations.
 - **Select “INSTALL SUPPORT” when the escalation is For Installs**

Order Escalations

- **Escalation Type** – Select an appropriate escalation type for the situation, SEE ESCALATION TYPES at the end of the documentation.
- **Message** – Type the details of the situation; please be specific.
 - **Note:** The message should include the cause or the trigger for opening the escalation.

Note: Many escalations will close automatically, but if the escalation requires follow up, users will now be aware of an open escalation by the bright red flashing **ORDER ESCALATED!** banner on the order in DOLI.



Escalation Types

SERVICER ESCALATIONS (OWNERSHIP = CLIENT SERVICES)

- **Damage to Customer Property/Product:** A customer or client alerts CRST Home Solutions to an issue where they believe our servicer has caused some type of physical damage to the customer's property. Examples include holes left in walls or a television being dropped by a servicer during installation.
- **Services not Complete or Below Standard:** The servicer did not complete the installation to the customer's satisfaction.
- **Missed Appointment:** CRST Home Solutions receives notification on the day of the appointment that the servicer fails or is unable to arrive for the scheduled arrival window.
- **Didn't Provide an Appointment Window or ETA:** This escalation is used when the servicer did not call to provide an ETA more than 30 minutes before the end of the arrival window or did not provide a 3-hour window and/or log the attempt in DOLI by 8 AM local time the day to the appointment where appropriate.
- **Unprofessional Behavior/Dress Code/Vehicle:** Servicer does not behave in a professional manner or he is not appropriately dressed or does not have appropriate ID or he does not have an appropriate vehicle for the job.

Order Escalations

- **Damaged in Transit:** CRST Home Solutions receives notification that the servicer has damaged product(s) while in route to an installation site.
- **Product Location Unknown:** The servicer fails to return the product or update CRST Home Solutions regarding returning the product or leaving the product on-site or the servicer lost/never returned product(s).
- **Theft Report:** Used when the customer reports that the servicer stole from him/her home.
- **Theft Report (legal):** Used when the customer reports that the servicer stole from him/her home and the customer has contacted attorneys have been involved.
- **Personal Injury Incident:** CRST Home Solutions is notified that our servicer's installation/actions caused personal injury to someone at the location where the installation took place.
- **Fire Reported** – Used when a fire is reported on site by either the servicer or the customer/client.
- **Leak Reported – Gas** – Use this escalation any time the customer reports leak of gas, propane or natural gas.
- **Leak Reported – Water** – Use this escalation type any time the customer reports leaking water.

INSTALLS ESCALATIONS (OWNERSHIP = INSTALLS SUPPORT)

- **Field Management Support:** Used when a servicer cannot perform the order as scheduled, but the customer does not or cannot reschedule.
- **Customer Requests Sooner Date:** Opened any time a customer or client requests a sooner date than what we have available. DOLI will close this escalation automatically.
- **Management Support:** This escalation signals to our management team has requested Compensation. These escalations are worked by Market Managers, Regional Managers, and Call Center Managers. These escalations are closed out and compensation discussed *after* the service has been completed.

CLIENT ESCALATIONS (OWNERSHIP = CLIENT SERVICES)

- **Product Issue:** Any client provided product is reported as damaged, defective, wrong, or missing parts.
- **Client Caused Service Issue:** The client created an issue that affected the service.
- **Wait-Time at Pickup Locations:** This escalation occurs when the servicer experiences a wait-time that is 30 minutes or longer at the pickup location. Phone 1 will only use this escalation if on hold with IST for 30+ minutes.
- **Client Caused Scheduling Issue:** The store creates a scheduling conflict by scheduling the order outside of CRST Home Solutions' scheduling policies or without verifying with a servicer or CRST Home Solutions to confirm the scheduled date.

Order Escalations

- **Customer Unhappy with Store Experience:** The servicer or customer calls to report the dissatisfaction with the store/client.