

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.

SERVICE CALL

Customer:

1. Call into CRST Home Solutions. When asked, provide your phone number
2. When asked, verify the address and customer name.
3. Inform the agent that your dishwasher is not draining and has a bad odor
4. Explain that this has been happening since just after the order was installed
5. Accept the 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. Ask the customer for a detailed description of the problem with the dishwasher e.g. "how long has this been happening?" and "does this happen every time you use the dishwasher?" - *Put this information into your notepad*
6. Review the Job Status and Comp Date in DOLI to make sure original service is in completed status and within warranty period.
7. Make note of service company A# - *Put this information into your notepad*
8. Click on **Enter New Order**
9. Complete the DOLI Order Creation Form:
 - a. **Client:** Choose the client that matches the **Blue Client Link** on the original order
 - b. **Campaign:** Choose the client that matches the campaign on the original order

- c. Select the **Selling Store** number from the original order.
- d. **Client Order ID**: Copy from the original order and paste in this field.
- e. Skip down to and fill in **Customer's Name, Address, Phone Number, Email** as they appear on the original order.
- f. Add the **Troubleshoot SKU** that matches the job type, e.g. Appliance or Gas Appliance – *These are at the TOP of the SKU drop down.*
- g. Click on **Submit Order**

10. **Search by the Customer Phone Number** in DOLI – *This will pull up TWO (2) orders in DOLI*

11. **Reassign the Troubleshoot Order to the Original Service Company** - *This must be done BEFORE scheduling*

12. **Offer the customer a date that is 2 business days/48 hours in the future, No Sundays or Holidays.**

- If an appointment for 48 hours out or sooner populated natures, offer the customer that date.
- If no appointments for 48 hours out naturally populate, Force Book the order 2 business days out.

13. Notate **BOTH** orders, include the original DOLI Job Number and the Troubleshoot DOLI Job Number

14. **If it is within 2 weeks of the original installation** open a “Services not complete or below standard” with a detailed description of the problem the customer is having.