

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 perform all verbal interactions with the customer, all order updates in the computer, and notate the call in DOLI.

BEST BUY UPSELL

Customer:

1. Call into CRST Home Solutions. When asked, provide your phone number
2. When asked, verify the address and customer name.
3. Advise the agent that you need to schedule your TV mounting service.
4. Accept the date that the agent gives you.
5. When the agent asks if there is anything else, inform the agent that the store said there may be an additional charge for mounting the TV over the fireplace and want to know how much it will cost.
6. Agree to pay for the additional service.
7. Advise the agent that you received the email and successfully entered your payment information

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. **Schedule the customer in DOLI** per the scheduling policy.
6. Ask if there is anything else you can help with.
7. Inform the customer that mounting over a fireplace is not included in the purchased service

8. Use the **Master Client SKU list** to determine the Best Buy specific **Installation over the Fireplace SKU**.
9. Advise that an additional charge is necessary when mounting over a traditional fireplace with a brick wall.
10. Use the **Make-It-Right button** to add the SKU as **Customer Pay**
 - Choose **Yes** the servicer is requesting additional payment or SKU changes/additions
 - Choose **Additional Work**
 - Choose **Is a new service needed?**
 - Choose the **SKU 5815-Installation over a Fireplace** from the dropdown
 - Choose **Customer Pay** from the “**Select Approver**” drop down
 - **The SKU cost will be displayed - Leave this window OPEN**
11. Determine if taxes should be charged, and calculate any necessary taxes.
12. Quote the customer the total price and offer to send a secure email invoice for the additional service.
13. Verbally confirm the email address to which the invoice will be sent
- 14. Fill out Blank Payline Form**
15. Explain the invoice to the customer and advise the customer to check their email for an email from Tara Gipp. Ask the customer to enter their payment information and let you know when it is complete.
16. Pretend to confirm successful payment in Payline and gather Transaction ID.
17. Return to the **Make-It-Right window** and click **Next**
18. Enter the Payline **Transaction ID**
19. Under “SKU Adjustments & Pricing,” **check the box for each SKU** you are adding to the order.
20. Click **Submit**
21. Recap and Close
22. Notate the call in DOLI.