

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.

Lowe's Custom Labor Request

Servicer:

1. Call into CRST Home Solutions. Give the DOLI Job number to the agent when asked.
2. Verify the customer's name on the order.
3. Explain that the cabinet in the customer's home will need to be cut for the appliance to fit.
4. You do not have an estimate for how long the additional work will take but are willing to complete the extra work for \$100 more.
5. Agree to be placed on hold.
6. Acknowledge that you will complete the work today once the agent informs you of IST's decision.

Agent:

1. Use the client appropriate greeting/branding.
2. Ask for the **DOLI Job number** and pull up the order.
3. Verify the **customer's name** on the order.
4. Ask how you can assist the caller.
5. Explain that the additional work will need to be approved by IST. Ask how much time it will take, or how much the servicer is requesting.
6. Click on **Trip Charge Info** and scroll down to the **Lowes Custom Work** Field.
7. Use the calculator to determine the **Price to Lowes** amount by entering the Amount Request by Servicer.

8. Ask to place the servicer on hold.
9. Pretend to call IST. Pretend that IST has approved the additional work.
10. Thank the servicer for holding. Confirm that IST has approved the additional work.
11. Recap
12. Close the call
13. Notate in DOLI.