SOURCE VALIDATION SCRIPT AND FAQ

Source validation script and FAQ

Source verification question:

- Option 1: **"How did you get to know about this project?"**
- Option 2: **"What is your source of booking?" (if the customer still doesn't understand the question, you can use option # 3)**
- Option 3: **"Sir/Mam, there are various ways such as Newspaper advertisement, Hoardings, Website, Referral or CP/Broker through which our customer books a residence/unit with us (Lodha). Which of these sources have you come from?**

Scenarios:

(In all below scenarios we will assume that the booking form mentions the source as CP)

Scenario 1.1:

"My ____ (family member/friend) had previously booked a flat with Lodha. So, he/she had accompanied me during the site visit."

RM response:

"Thanks for confirming. I will record that your booking source is referral.

Scenario 1.2:

"I had come through my (family member/friend), who informed me about Lodha project"

RM response:

"Sir/Mam, Does this person (family member/friend) also wanted to book an apartment or he is an existing Lodha customer or a broker?

Scenario 1.3:

"I don't know if he is a broker?

RM response:

"Sir/Mam, Request you to share his name, organization he works and his number."

Scenario 2:

"I had applied for the project online and someone called helped me with the process."

RM response:

"Did the person who helped you with the process was from Lodha?"

"If not, kindly share whether this person is known to you or he is a broker"

Scenario 3:

"I don't remember, why don't you refer to the form that i had filled where I have mentioned that information?"

RM response:

"We have that information however as a process we need to confirm the same verbally as well from you."

Scenario 4:

"Why don't you read what you have on your system and i will let you know if the name is correct?"

RM response:

"I apologise. We need this information to be confirmed by you."

Scenario 5:

"Why don't you talk to my broker / sales manager and get that information?"

RM response:

"Sir/Mam, I understand that it is an inconvenience for you. We need this information to be confirmed by you since you are the primary applicant. I would appreciate if you could co-operate and provide me with this information."

Scenario 6:

"All the formalities were done by my cousin (third party / POA). I will give you his number, why don't you get in touch with him/her and get the information?"

RM response:

"Sir/MAM since he/she is not the applicant or co-applicant on this booking. We need this information to be confirmed by you. However, you can call him/her and get the information and we will be obliged. On your request I can give you a call back as per your convenient time."

Scenario 7:

"No, I don't have any information my son did the booking who takes care of all the matters related to the same. I encourage you to talk to him, take down his number"

RM response:

"No Problem Sir/Mam, We can talk to your son, we request you to send us an email from your registered email ID to discuss all matters with him (If the registered email ID is not of the applicant, ask the customer to send us a scanned copy of the written request)"

Scenario 8:

"I do not remember the entire name... I think it starts with __(XYZ)__"

RM response:

"Mr/Mrs. I request you to share the complete name. If you want i can hold while you check for that information or call you back at a convenient time."

(Note: The RM should not at any given point in time prompt or hint the customer about the CP name)

Scenario 9.1:

"I came to know about your project through a newspaper."

RM response:

"Great, did you come to the site for booking along with someone?"

Scenario 9.2:

"Yes, I came with a friend/family member of mine"

RM response:

"Does this person (family member/friend) also wanted to book an apartment or he is an existing Lodha customer or a broker?

Do's & Don'ts

Do's:

- RM should probe for the source of booking
- RM should always get the CP information from the applicant or co-applicant

- RM should always ask for CP company name but can accept the source validation if at least broker name is shared

Don'ts:

- RM should not proactively inform that it is a CP booking

- RM should avoid giving any hint if the customer knows a portion of the CP name.

- RM should avoid using any such probing question which leads the customer to admit that he did the booking through CP.

- If the customer is unable to recollect the CP name then, RM should not provide the customer with options of different CP's and expect the customer to pick from the options.

Process guidelines to be adhered to, in case of source conflicts/denial in Channel Partner deals:

- Email is sent to Sales team, CC Brokerage & SAP, intimating source denial/conflict along with the call history soon after the RC call

- Detailed remark is updated in SFDC for easy reference in future.

Listing down, effects of non-adherence in CP denial cases, on the process for better understanding:

- Source denial cases not reported to CC brokerage team on time. We get to know about such instances while listening to calls, post receiving the brokerage bill. Rejection of invoices at this stage invites unnecessary escalation from sales team.

- Sales team is not intimated about the source changes post relationship call. This results in Sales team accepting brokerage invoice from Channel Partner which are rejected at later stage by CC brokerage team causing CP dissonance and unnecessary escalation from sales team.

- SAP team is oblivious about the denial by client and hence deal is logged in basis source details mentioned in the application form, i.e Channel Partner. Sales team accepts the brokerage bills basis source updated in SAP. Again, in such scenarios, these cases are rejected by brokerage team basis relationship call. These cases are escalated by sales team.

- Sales team is told that there is a source denial **but not enough details are provided on what was mentioned by the customer on the call** which leads to sales following up on these cases with a request to listen to the welcome call.

Frequently Accessed Links

Cancellation & Retention Policy | Possession process | Registration Process | Name Change Policy | Demand Generation process | Transfer Policy
Payment Handling Process | Customer Interaction Management Policy | Customer Interaction Tagging - L1, L2 & L3 | Customer DNC Process