SOURCE VERIFICATION PROCESS

Source validation script and FAQ

Source verification question:

- Option 1: **"What is your source of booking?" (if the customer still doesn't understand the question, you can use option # 3)**

- Option 2: **"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 you have been referred by our existing customer_____", if name not provided by the customer probe for the name, Project & Flat details and capture the same on SFDC.

Scenario 1.2:

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

RM response:

"Sir/Mam, Did this person (family member/friend) also come 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 called back and helped you with the process was from Lodha?" If request you to confirm the name of the Sales manager?

"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 to complete the booking formalities"

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 to complete the booking formalities."

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. Do let me know if this is not a convenient time and we can call back"

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."

"No but I cannot provide this information since I am not sure Please call the person I have informed you?"

"Sure. I will call up the person basis your permission to confirm the details. May I have his/her number?

Scenario 7:

"No, I don't have any information my son did the booking who takes care of all the paper work related to the same. I encourage you to always 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, good to know that, did you come to the site for booking along with someone or did someone else as well inform you about the property due to which you visited the site to book"

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

- RM should always probe in case the source of booking in the application form is CP and the customer confirms it to be direct such as Newspaper/email etc...

Don'ts:

- Proactively inform that it is a CP booking

- Give any hint if the customer knows a portion of the CP name.

- Provide the customer with options of different CP's and expect the customer to pick from the options.

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