

## DaData Cancellation Call Flow

- Open Call – ex. Thank you for calling Nationwide Assist, my name is \_\_\_\_\_. My I have your telephone number, area code first please?
- One moment while I access your account. **(Take a moment to review the account notes)**
- May I ask whom I am speaking with? And may I have your address (be sure to get city, state, and zip code) **(Write down any information that does not match)**
- How may I help you today?
- I will be happy to help you with that.
- Explain enrollment. Use scripting.

### Script for Verification Who did this? **(If name appears the same, follow this script)**

We received an online registration from the website (insert site name) under the name of (insert name), with an email address of \_\_\_\_\_, a physical address of \_\_\_\_\_, and a mother's maiden name of \_\_\_\_\_. This telephone number was provided for billing purposes. Is this your information? (If they confirm this is their information ask them the following question) Did you not intend to register for our service? (If they say no) That's ok I can cancel this service for you immediately. (If they deny that the information is theirs, just move on to the cancellation process and script assuring them you will be able to assist them)

### The Caller is not the person who registered: **(If name is different on the account)**

If you are NOT speaking with the person who registered you should verify the registration process using the following script:

We received an online registration from the website \_\_\_\_\_ under the name of \_\_\_\_\_ and the telephone number \_\_\_\_\_ was provided for billing purposes. Do you know this person? *(If they respond I don't know this person and none of the information matches except the telephone number your response should be)* That's not a problem I will cancel the service immediately. What is the date of the charge is that you are calling about so that I can issue a refund back to your telephone account. *(If they know registrant ask the following questions)*

1. How do you know this person?
  2. Are they authorized to make changes to this phone number?
- Cancel account.
  - Ask the date of the charge they are looking at? Explain any upcoming charges if any. Is the phone still in service?
  - If the customer said they have already spoken to the phone company, "Did the phone company say they were going to issue any credits?"

- Credit account. Give credit total and state plus tax. Inform them they will see the credits in 1 to 2 billing cycles.

### **Script for Ending The Call:**

What I have done for you today, Mrs. Smith, is I have canceled the account and issued \_\_\_\_\_ credits (or requested a check refund in the amount of or summarize any other action taken) in the amount of \_\_\_\_\_ plus tax. These credits will appear on your telephone statement within 1-2 billing cycles. (Or you should receive your refund check in 5-7 business days. Your confirmation number is \_\_\_\_\_. Is there anything else that I can help you with today? (If they say no then continue to) Thank you for calling \_\_\_\_\_ (ex. Nationwide Assist) and have a nice \_\_\_\_\_ (insert day or evening)

- Stroke out the call.

### **Dadata Script for explaining the Voicemail Service:**

#### **What is this? Why would I need this type of service?**

We provide a stand-alone voicemail message service. Upon registering for the service the customer receives a toll free number and a private voice mailbox. This allows family, friends, or business associates to leave unlimited messages from anywhere in the continental United States at no cost to them 24 hours a day 7 days a week. The account can be managed by telephone or you can choose to manage the account online. Our service can be used by small business owners so that they can give their customers toll free access to them and an 800 number which can be used on their letterhead and business cards; military families, families with kids away at college to cut down the cost of cell phone bill, and single women who don't want to give out their home number to someone they just met.

#### **Script for Can't Find the Account:**

I'm sorry I am not finding an account using the telephone number you have provided. May I have the number again; it's possible that I entered it incorrectly? Ok, that number is not pulling up an account on our system, have you had an area code change in your area recently? **(If they say no move on to the next question)** All right, let's see do you have any other dedicated lines coming into your home/business; for example a computer, fax or multiple ring tone lines? Those numbers would be billed under your main number. **(If you still do not pull up an account go to Not Found Account Script)**

**Not Found Account: (only if everything else has been attempted, including floor support)**

I apologize, I have not been able to find an account with the number(s) that you have provided. If you will fax or mail a copy of your telephone bill showing the charges circled or underlined we will be glad to research this for you and send you our findings. If we do find an active account I assure you it will be cancelled and any credits that need to be issued will be. Please include your name, number being billed, daytime contact number, address and the reason for your correspondence when you send us your telephone statement. Remember, we only need the page that shows the charges you are calling about. **(Give the caller our fax number and/or our mailing address. They will usually receive a response back within 5-7 business days)**

**Script for how service is obtained:**

**How did I get this service?**

The only way to receive our service is through an online registration, which is offered on various websites. All information received in the online registration must be **manually** entered and the customer must check the box stating they have read and understood the terms and conditions and **click on accept and submit/confirm** and **then click on confirm again** on the second confirmation page in order for the account to be opened. Customers receive a **Welcome Email** immediately upon registering for the service. This email verifies all of the information used to register the account, instructions on how to set up and use the service, explanation of the billing process and a customer service telephone number and email address should they wish to cancel the service.

**Script for Did Not Authorize:**

**(Every call is different, with customers being at different levels of agitation. While we can't foresee every question; the following can be used as a guideline to help you with this type of customer.)**

I do understand that this account is not authorized by you. I will be glad to cancel it and refund all of the charges today. **(If they are concerned about identity theft/fraud, you can use the following response to reassure them.)**

Please let me reassure you, the only information contained in the registration that is yours is the telephone number that was submitted for billing purposes. We try very hard to prevent unauthorized accounts with our registration process. We are happy to cancel and refund all charges when this happens and I am doing that for you today.

**How did you put this on my bill without my authorization**

**This is the number that was provided for billing purposes when the online registration was filled out.**

**Do I pay this charge or do I pay the bill minus the charge**

I cannot advise you whether to pay that portion of your bill or not. I can confirm for you that I have cancelled and **issued a credit in the amount of (insert credit amt) to your account today and that this should appear on your telephone statement within 1-2 billing cycles.**

**If further explanation is needed:**

Your phone bill is generated from your phone company, so I cannot advise on how to pay that portion of your bill. **What I can do is confirm that we have cancelled and credited your account today and your confirmation number is (insert confirmation number).**