

**Dadata / Advanced Data-Comm**



# Customer Service Education & Development Workbook

## Current Product Information

### **Nationwide Assist Voicemail Service - \$12.95 per month**

Billing Company: ESBI or Enhanced Billing Services

Customer Service Telephone Number: 866-527-4969 (Dadata / Largo Call Center)

Email Address: [support@mynationwideassist.com](mailto:support@mynationwideassist.com)

Mailing Address: Processing Center  
PO Box 15624  
Clearwater, Florida 33766

Fax Number: 866-227-4201

Sale Demo Sites: <http://mynationwideassist.com/SignUp/index.html> - grocery  
<http://mynationwideassist.com/FreeGas/index.html> - gas

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### **My Info Guard Voicemail Service - \$12.95 with No Benefits / \$14.95 with Benefits**

Billing Company: ESBI or Enhanced Billing Services

Customer Service Telephone Number: 800-773-0052 (Dadata / Largo Call Center)

Email Address: [support@myinfoguard.com](mailto:support@myinfoguard.com)

Mailing Address: Processing Center  
PO Box 15624  
Clearwater, Florida 33766

Fax Number: 866-227-4201

Sale Demo Sites: [http://dadata.net/Sites/MyInfoGuardGrocery\\_1/index.html](http://dadata.net/Sites/MyInfoGuardGrocery_1/index.html) - grocery  
<http://myinfoguard.com/FreeGas/index.html> - gas  
[http://dadata.net/Sites/MyInfoGuard\\_2/index.html](http://dadata.net/Sites/MyInfoGuard_2/index.html) - grocery with benefits

Benefits Package: Identity Theft Service Benefits:

- \$25,000 Identity theft Insurance by AIG
- Income Protection Coverage
- 3-Free Legal Consultations per year
- Expense Reimbursement
- 1-Free Income Tax Planning Consultation
- Access to Identity Theft Recovery Professionals if your identity is stolen

#### **Please Note:**

**The Sale Demo Sites are used for training purposes only and should never be given to customers. This is not the sales site that the customer signed up on.**

## Policies & Procedures

As you work through this training manual you will learn several policies and procedures that allow you to handle the customer's requests and needs. It is imperative that you understand these procedures and you apply them as they are intended. As we review our product and the marketing channels that the customer signs up through, you will find that most people will not accurately read the application and therefore they fail to understand how the billing process works. It is not our intention to fight with or make a point with our customer. It is our intent to educate the customer as to how they signed up for the program, how it works and work with them to decide if they wish to keep the service or cancel it.

In the instance that the customer wishes to cancel and receive a refund, you will find that our company maintains a very liberal refund policy. As a Customer Service Associate you have the ability to issue (2) billed refunds and (1) additional billed refund that the customer may not have seen yet. So in total you can issue up to (3) refunds during certain situations. However, for unauthorized situations you are empowered to issue all refunds. So it is imperative that you understand which process fits your customer's situation and act accordingly. At times your customer may not agree with your decision and the call may need to be transferred to one of your support management team or your supervisor. Please understand that based on the situation, they are in the position to override the policy and issue additional refunds if needed. Their goal is to work with the customer and eliminate any further complaints.

As we stated earlier, you will address these processes in further detail later in the training.

## Billing Company

Our voicemail product is billed to the consumer's telephone statement. We maintain a contract with one billing company (ESBI) who process our billing directly to the consumers Local Exchange Carrier. We refer to this as LEC. You will hear this term frequently throughout your training. This contract is very important to our business and in order to maintain this contract we have to stay below a 1% threshold for complaints, received directly to the billing company or LEC.

Our goal is handle the customer as effectively as we can during that first contact. If this doesn't happen the customer can generate an additional call to the billing company or to their own LEC, who then files a complaint with our billing company.

Each month we receive a list of those customers who have filed complaints with the billing company / LEC and we review each account to determine if the call was handled according to procedure and if any other action could have been taken to reduce the complaint.

Frequent violations to the complaint threshold can result in a cancelled contract, therefore canceling a product and losing business.

## Billing Company Monitoring

Customer Service Calls are monitored by the billing company. They monitor transferred calls to ensure that we are meeting the expectations as required in our contract. Each month we receive a report on the program with the results of their review. The report notifies us of the customer, the CSR and a complete review of what transpired during the call.

These reports are forwarded to Dadata each month and if any issues are brought to our attention we will review them with you immediately. Please understand that we are required to review the issue with you and report back to the billing company why this issue happened or if we have made a change to prevent these issues from happening in the future.

# Voicemail Service Overview

The service allows family and friends or small businesses to receive unlimited messages. For \$12.95 per month the consumer has unlimited usage of the service each month.

The consumer is assigned a toll free access number which is available to the consumer and their callers from anywhere in the continental United States, Alaska, Hawaii, Puerto Rico and many of the U.S. Caribbean Islands. The system will not allow calls from pay phones. The number of messages the consumer can receive is unlimited. We store messages for 14-days and the maximum length of a message is 30 seconds. Messages can be downloaded to the consumer's personal computer by logging into the consumer website. If the consumer has supplied us with their email address as part of their application the consumer will receive email notifications when messages are received.

The Voicemail is billed at \$12.95 per month. There is no contract and the service can be cancelled at anytime. The consumer must be at least 18 years old and authorized to make changes and incur charges to the telephone service. The \$12.95 monthly service fee will be automatically billed to the monthly telephone bill and the charges will appear on the specific billing company billing page. The consumer can cancel the service by calling customer service or by e-mailing us at the programs email address.

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.

## ***Here is an example of a Nationwide Assist Welcome Email with a grocery inducement:***

Dear Consumer,  
Thank you for selecting Nationwide Assist Voicemail.  
To begin using the service you will need the following information:  
Your 800 number: 8885666421  
Your Personal Mailbox number: XXXXXXXX  
Your PIN: XXXXXXXXXXXX

To start using your voice mail service simply dial your 800 number and follow the instructions. It is recommended you change your PIN upon first using the Voice Mail service for your security. The voice mail service is designed to allow friends, family and business associates to leave you messages 24-hours a day, seven days a week by dialing your Nationwide Assist (800) number and entering your personal mailbox code. The service allows you unlimited messages and the calls are toll free for you and everyone else. There is no contract and the service can be cancelled at anytime. Simply give out your private (800) number and your personal mailbox number to those individuals you wish to leave you messages. When they want to leave a message they dial the (800) number and enter your mailbox number. The system plays your personal greeting and leads them through the process of leaving a message. At the completion of the message we will save the message and immediately notify you through email that you have a message. You can also call your 800 number and the system will tell you that you have a voice mail. You can retrieve and listen to your messages in two ways; by dialing into the system using the (800) number or by logging onto the website by simply going to the link [www.mynationwideassist.com](http://www.mynationwideassist.com).

The monthly service fee is \$12.95 per month and will be billed automatically by Nationwide Assist, to your monthly telephone bill each month thereafter on the anniversary date until you cancel your service.

Should you have any questions, please feel free to contact our Customer Service Division at 866-527-4969 or you can receive information about your account, process changes and / or manage your mailbox from any PC with an Internet connection by logging onto our website by simply going to the link [www.mynationwideassist.com](http://www.mynationwideassist.com).

Again, thank you for selecting Nationwide Assist Voicemail and we look forward to serving you.

### **Coupon Info:**

Simply click on [Coupons](#) and enter the information above to begin selecting the coupons of your choice!

Thank you;  
Customer Service  
Nationwide Assist Voicemail

# Billing Company Overview

All the voicemail products are billed through a third party billing company. We are currently working with one billing company, which is listed below:

## □ ESBI – Billing Concepts

We submit daily files to the billing company for those accounts that have cycled for their monthly billing. The billing company accepts the charge and posts it through the consumers LEC. The consumer will then see the billing on their telephone statement under the section labeled Other Service Providers.

When the LEC posts the transaction onto the consumers telephone statement they add certain state and local taxes. Please be aware that the taxes are never the same and each LEC can charge different amounts of taxes. We DO NOT charge the tax. When credits are issued the LEC will normally credit the taxes as well.

**Note:** We do not charge cell phone numbers and request the home telephone number for billing purposes. In most instances the LEC will reject cell phone numbers, but there are instances where they will go through.

## How Is The Call Directed To Us?

When the customer sees the charge on his or her telephone statement it will state the name of the voicemail program and a toll-free telephone number. This is NOT our telephone number – it is the billing company customer service telephone number.

The customer dials the billing company and is requested to enter his or her 10-digit telephone number. If the customer has more than one billing from several different businesses, the call is directed to one of their agents. At that time the billing company will determine which transaction the consumer is calling in reference to and at that time they will transfer the call into our Customer Service Center (Operator Assisted). If the customer enters their telephone number and we are the only company billing them the call will automatically be transferred into our Customer Service Center, by-passing any assistance from the Billing Company Service Representatives (Hot Transfer).

In the first scenario if the customer has been placed on hold due to high call volume at the billing company, our goal is to answer the call as soon as it is transferred to us, therefore eliminating any further hold time for the consumer. We also make every attempt to answer the direct transfers in the same manner.

**Note:** Customers can also contact us directly through the toll-free telephone numbers on our websites and welcome emails. These calls do not go to the billing company and will come directly into the Dadata / Largo, FL Call Center.

# Products & Services

## Inducements

Each time we sell a voicemail product it is normally partnered with an inducement to thank the customer for purchasing our voicemail product. Inducements are normally free products and in some instances small surcharges will apply if they choose to accept or use the inducement. Currently we have used (2) inducements with our voicemail product and they are listed below with a brief description of the service or product:

### **\$1000 Grocery Coupon Offer** – [Link www.icangroceryshop.com](http://www.icangroceryshop.com)

- Customer receives a link in their welcome email that they can click on
- The link will allow them to enter into the Grocery Coupon Website
- From the website they have the ability to download \$1000 worth of grocery coupons
- They do NOT have to use the \$1000 at one time and can use it as they need them
- There is NO surcharge or cost for this service

### **\$250 Free Gas Offer**

Listed below are the actual terms for this offer. Please review the process so you will understand how the customer redeems the offer. This example is from Nationwide Assist:

#### **How To Use & Terms and Conditions**

Completely fill out, detach and mail the "Enrollment" part of this certificate to the fulfillment center at: **Redemption Center, 119 Rockland Center #69, Nanuet, NY 10954**, within 30 days of the issue date. Include three (3) months of telephone statements that show you have paid for Nationwide Assist. **This information is for verification purposes only and will not be used to process nor be considered authorization on your part to transact further on your account, without your express permission.**

Upon receipt of your enrollment form you will be sent you're first in a series of eleven \$20.00 refund request vouchers to be used for eleven consecutive months. On the twelfth month, you will be sent a \$30.00 refund request voucher. Only one coupon per month is valid. Each coupon expires 30 days from the effective date. They are NOT REPLACEABLE if lost or stolen.

Nationwide Assist must receive the Voucher and receipts prior to the expiration date or that coupon is no longer valid and can no longer be redeemed for the rebate requested with the voucher. After you receive the voucher simply purchase your gas at any gas station in the U.S.A. and mail your original receipt and your appropriate voucher to the fulfillment center. Please allow 4-6 weeks to receive your refund checks. Only original gas receipts and vouchers may be submitted. Photocopies or duplicate receipts and vouchers will not be recognized. **YOU MUST BE AN ACTIVE SUBSCRIBER AT THE TIME OF REDEMPTION.** If you have cancelled the service, you are no longer eligible to receive refund requests. All vouchers must include receipts for **GAS ONLY**, which must not be older than 40 days from the date of the postmark. The receipt must clearly indicate a **GASOLINE PURCHASE.**

The maximum monthly refund is the amount shown on the face of each voucher. If the submitted receipt is less than the published value, only the amount of the receipt will be refunded. No credit will be issued for the unused portion of the voucher. Incomplete requests will not be acknowledged, processed, or returned. No exceptions. The registration form and refund request voucher must be postmarked before the expiration date to be valid. This program must be validated by the program sponsor. Upon receipt of a valid voucher, valid PIN, receipts for gas only, with the receipts being within the prescribed time frame and receipt of all the above prior to the expiration date of each coupon, then Nationwide Assist shall issue a check made payable to the members name indicated on the voucher at the address provided to Nationwide Assist in an amount no greater than the face value of the voucher redeemed. If a participants' receipt equals and amount less than voucher amount then the participant shall receive a check for the amount of the receipt less than the face value.

This offer is void where prohibited by law. All the vouchers in a set must be redeemed by the same individual. No refunds will be issued to businesses, organizations, etc. Vouchers and/or enrollment forms may not be redeemed or exchanged for cash, or sold to the end user, and further has no cash value either expressed or implied other than the terms and conditions printed herein. This offer is nontransferable. Nationwide Assist disclaims any and all expressed or implied warranties, including but not limited to the implied warranties of merchantability, fitness for a particular purpose, and non-infringement. Nationwide Assist shall not be liable or responsible for those guarantees, warranties, and representations of any other companies, marketing partners, or suppliers of services. No advice or information, whether oral or written, obtained by a participant from Nationwide Assist shall

create any warranty not expressly made herein. Nationwide Assist shall be the sole determiner in cases of suspected abuse, fraud, or violation of its rules and any decision it makes relating to the termination of the coupons shall be final and binding.

## Using The Voicemail Service

The voicemail service is very simple to set up and operate. Every CSR should be able to explain the steps in detail to the customer in order to assist the customer in using the service. The following instructions will assist you in this procedure:

- ❑ Provide the customer with their **toll free number** found in the upper left hand of the personal information screen in the Dadata system.
- ❑ Provide the customer with their **mailbox number** found in the upper left hand of the personal information screen in the Dadata system. (**This is also known as the account number and/or the confirmation number**)
- ❑ Instruct the customer to **dial their 800 number** and enter the **mailbox number** at the prompt. There are three (3) options to choose from:
  - a. Option 1 is for leaving a message.
  - b. Option 2 is for retrieving messages.
  - c. Option 3 is for managing the voice mailbox.
- ❑ Instruct the customer to **Choose Option 3.**
- ❑ The system will ask for a password or PIN number. This is the **10-digit telephone number** that was entered in the online registration. The CSR should verify this number with the customer, since they may not remember the number they used in the registration process. The system will request the customer to change their PIN to a new number for safety reasons. Simply instruct the customer to follow the prompts.
- ❑ The customer can now add a name and record a mailbox greeting which completes the **setup** phase of the voicemail service.
- ❑ The CSR should advise the customer to give their **toll free number and mailbox number** to those they wish to receive messages from.

# Dadata Service System

The Dadata Service System is our processing system. While this is probably the easiest part of your training it is the most important, simply because if you use it correctly it makes your job so much easier.

The Dadata Service System is run through Internet Explorer and can be accessed from the Internet at anytime. However; logging into the system is prohibited during non-working hours or days off. Our IT Division tracks system usage and reports any unusual login or activity. You are required to obtain a login name and password when you are hired and that login information makes you unique within the system. This is why it is imperative that you do not allow others to use your login name and password at anytime. Also, passwords will expire every 30 days for all associates.

From the Internet Explorer Browser page enter: [www.vmcallscenter.com](http://www.vmcallscenter.com). This will bring you to the login page. From this screen enter your assigned Login Name and Password and press Login.

The system will then bring you to the main page of the system. From here you will see the following screen:

daData, Inc - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Stop Refresh Home Search Favorites

Address <http://training.vmcallscenter.com/> Go Links

Main Menu

## Master Search

You are in the Training Mode

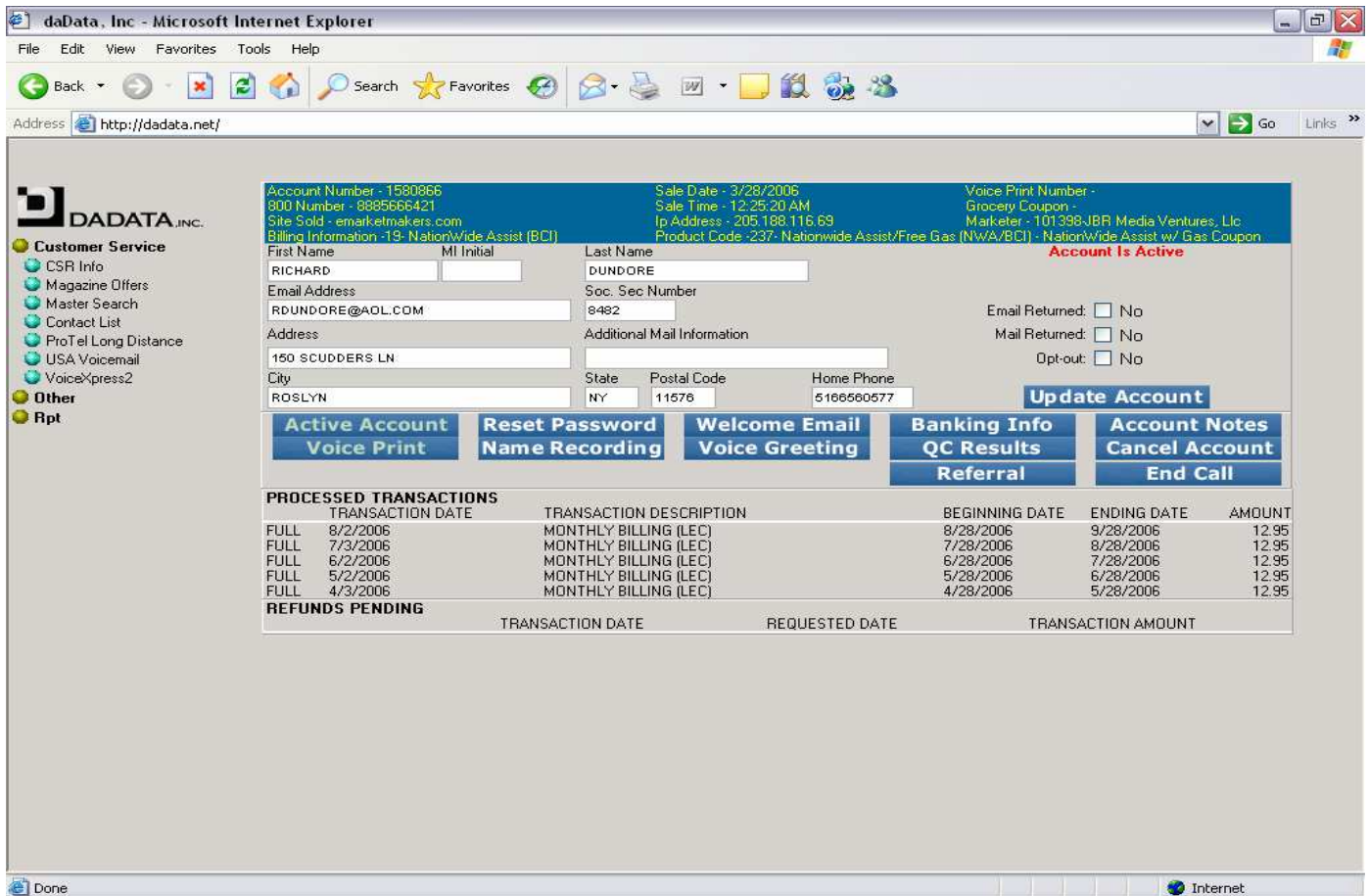
Home Telephone Number

Last Name

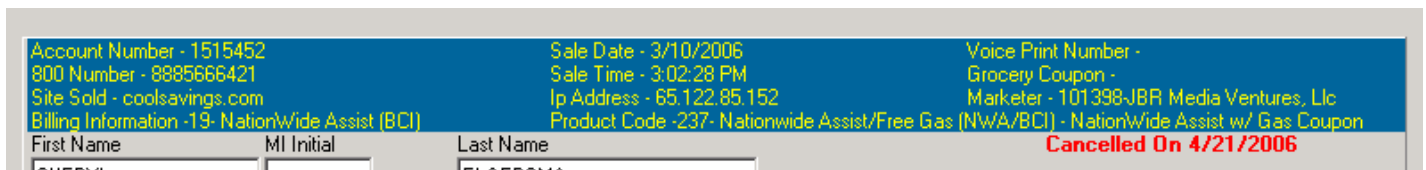
Email Address

Done Internet

Once the telephone number is entered the system will open the account, if one exists. You will see the following customer page. This page has all the information you will need to process an inquiry from a customer, with the exception of the Account Notes Page.



The top of the customer screen gives us information that is helpful in understanding how the account was signed up for, what date, what time and what product and service the customer received. Let's take a minute to review the top banner and what the information means.



**Account Number:** This is the customers account number and mailbox number. It is also used as a confirmation number when you close the call.

**Sale Date:** The date the customer signed up for the service

**Voice Print:** N/A – only used on telemarketing deals

**800 Number:** This is the customers 800# used to receive and pick up voicemail messages.

**Sale Time:** The time the customers' sale was submitted. Normally within a few minutes from when the customer entered the information.

**Grocery Coupon:** N/A

<b>Site Sold:</b>	This is the site that the customer entered the application on. Normally these are consumer survey sites or re-directs from free products or questionnaires.
<b>IP Address:</b>	This is the IP address where the sale came from.
<b>Marketer:</b>	This is the name of the Marketing Agent – this information is <b>NOT</b> given to the customer. It is used for internal tracking and monitoring only.
<b>Billing Information:</b>	Advises you the name of the product and the billing company
<b>Product Code:</b>	Shows the product code which identifies the specific program and gives a brief description of what the product was sold with.

## Answering The Call

Use the following greeting when answering the telephone to ensure you get the telephone number immediately:

### Telephone Tip:

Thank you for calling Nationwide Assist, my name is Jane. May I have the telephone number with the area code first please?

Verify all information on the personal information screen with the customer. This includes the name, address, email, city, state and zip code. Make any necessary changes if info does not match. Make these changes in your notes.

## Can't Find an Account?

If the telephone number does not come up and you are unable to locate an account; take the following steps to troubleshoot the problem:

- Double check the telephone number to make sure you have entered it correctly;
- Verify that the customer has been billed. Request the customer to read the information showing on the telephone statement. Verify the name of the service and understand that there are many companies also billing to telephone bills and the names may be similar;
- Confirm if there are any other lines attached to that telephone statement such as a fax or computer line or a multi ring line.

If none of these solutions allow you to locate the billable account, advise the customer to send a copy of the telephone statement showing the billing along with their name, telephone number and address so Customer Support can research the issue further. They can mail or fax the information to Customer Service Support for processing.

## You've Found the Account – Now What?

Listen to the customer to determine what his or her needs are. At this time you will be faced with many different scenarios on how to handle the call. The following procedures are designed to help you process the request once you have determined the necessary action. During training you will go through scenarios so you better understand when and how to use these procedures.

### Does The Customer Wish To Cancel?

A customer may cancel a voicemail box account at any time. You must listen to the customer to determine which cancellation code best fits the customer. This information is used when you close the call.

- Did not Authorize:** The account holder does not know the customer nor did they authorize anyone to use their telephone number for billing purposes. No information matches on account, like the address.
- Business Number:** The number being billed belongs to a business and an employee or other unknown person opened the account. If the account was opened by the business owner or an authorized user then you would follow the up to three credit allowance.
- Did not Understand:** The customer recognizes the website but did not understand the service or that they were signing up for the service.
- Changed Mind:** The customer changed their mind and no longer wants the service.
- No Reason Given:** The customer does not give a reason for canceling the account.
- Does not Remember:** The personal information matches, however, the customer does not remember the website or insists they did not register for the service.
- Household Member** - This would be any person known to the account holder. A family member or friend who knows their telephone number and completed the application without authorization. Including but not limited to spouse, siblings, children, parents, cousins, neighbors, etc.

# Referrals

## Check Requests

When you need to request a check you would click on referral.

daData, Inc - Microsoft Internet Explorer  
Address: http://dadata.net/

**DADATA, INC.**

- Customer Service
  - CSR Info
  - Magazine Offers
  - Master Search
  - Contact List
  - ProTel Long Distance
  - USA Voicemail
  - VoiceXpress2
- Other
- Rpt

Account Number - 1580866      Sale Date - 3/28/2006      Voice Print Number -  
800 Number - 8885666421      Sale Time - 12:25:20 AM      Grocery Coupon -  
Site Sold - emarketmakers.com      Ip Address - 205.188.116.69      Marketer - 101398-JBR Media Ventures, Llc  
Billing Information -19- Nationwide Assist (BCI)      Product Code -237- Nationwide Assist/Free Gas (NWA/BCI) - Nationwide Assist w/ Gas Coupon

Account Is Active

First Name: RICHARD      MI Initial:      Last Name: DUNDORE  
Email Address: RDUNDORE@AOL.COM      Soc. Sec Number: 8482  
Address: 150 SCUDDERS LN      Additional Mail Information:  
City: ROSLYN      State: NY      Postal Code: 11576      Home Phone: 5166560677

Update Account

Active Account    Reset Password    Welcome Email    Banking Info    Account Notes  
Voice Print        Name Recording    Voice Greeting    QC Results        Referral

**PROCESSED TRANSACTIONS**

	TRANSACTION DATE	TRANSACTION DESCRIPTION	BEGINNING DATE	ENDING DATE	AMOUNT
FULL	8/2/2006	MONTHLY BILLING (LEC)	8/28/2006	9/28/2006	12.95
FULL	7/3/2006	MONTHLY BILLING (LEC)	7/28/2006	8/28/2006	12.95
FULL	6/2/2006	MONTHLY BILLING (LEC)	6/28/2006	7/28/2006	12.95
FULL	5/2/2006	MONTHLY BILLING (LEC)	5/28/2006	6/28/2006	12.95
FULL	4/3/2006	MONTHLY BILLING (LEC)	4/28/2006	5/28/2006	12.95

**REFUNDS PENDING**

	TRANSACTION DATE	REQUESTED DATE	TRANSACTION AMOUNT
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You would then want to click the check request option.

The screenshot shows a Microsoft Internet Explorer browser window displaying the daData, Inc. website. The address bar shows <http://dadata.net/>. The website header includes the daData, Inc. logo and a navigation menu with categories like Customer Service, Other, and Rpt. The main content area displays account information for a customer named RICHARD DUNDORE. A table of referral items is visible, with a white arrow pointing to the 'Check Request' radio button option.

**Account Information:**

- Account Number - 1580866
- 800 Number - 8885666421
- Site Sold - emarketchmakers.com
- Billing Information - 13- Nationwide Assist (BCI)
- Sale Date - 3/28/2006
- Sale Time - 12:25:20 AM
- Ip Address - 205.188.116.69
- Product Code - 237- Nationwide Assist/Free Gas (NWA/BCI) - Nationwide Assist w/ Gas Coupon
- Voice Print Number -
- Grocery Coupon -
- Marketer - 101398-JBR Media Ventures, Llc
- Product Code - 237- Nationwide Assist/Free Gas (NWA/BCI) - Nationwide Assist w/ Gas Coupon

**Customer Information:**

- First Name: RICHARD
- MI Initial: [ ]
- Last Name: DUNDORE
- Email Address: RDUNDORE@AOL.COM
- Soc. Sec Number: 8482
- Address: 150 SCUDDERS LN
- City: ROSLYN
- State: NY
- Postal Code: 11576
- Home Phone: 5166560677

**Account Status:** Account Is Active

**Options:** Email Returned:  No, Mail Returned:  No, Opt-out:  No

**Buttons:** Update Account, Active Account, Reset Password, Welcome Email, Banking Info, Account Notes, Voice Print, Name Recording, Voice Greeting, QC Results, Cancel Account, Referral, End Call

**Referral Items Radio:**

Please Select One

- Check Request
- Inquiry

ENDING DATE	AMOUNT
/28/2006	12.95
/28/2006	12.95
/28/2006	12.95
/28/2006	12.95
/28/2006	12.95

ION AMOUNT

The next step would be filling out the request and providing any information needed or required to issue out the check. Enter in the reason for the check request; whether it is because the LEC rejected the credit or the customer informed you that phone line was no longer in service.

The information entered into the Referral Request should include the name of the Telephone Accountholder, the correct mailing address, a phone number if different from the one on the account and the amount of the requested credit and taxes.

When entering the Amount charged, this amount should only include the total amount of the credit, such as \$12.95 or for two sales \$25.90. The tax amount should only include the total tax amount such as \$0.39 for one transaction or if you were crediting two transactions the tax amount would read \$0.78. The system will total the two on the referral for the total check amount.

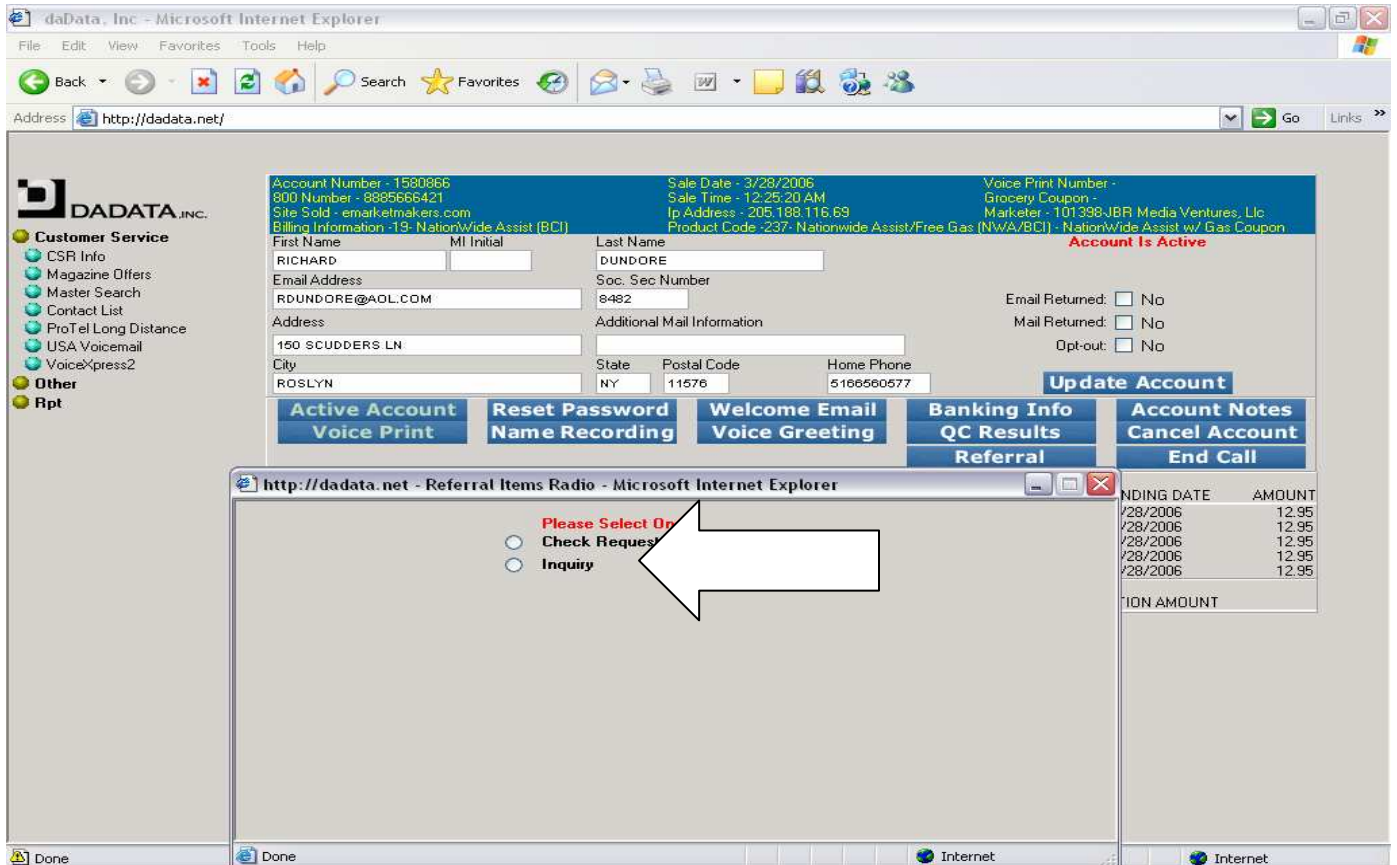
All the information you type into the explanation screen will appear in your notes.

The screenshot displays the daData, Inc. web application interface. At the top, there are statistics: Updated 8/2/2006 2:08:00 PM, CallsInQueue 0, OldestCallInQueue 0, CallsAnsweredInQueue 1440, CallsAbandonedInQueue 8, AverageCallInQueue 0, and AgentsLoggedIn 25. The account details for account number 1590966 are shown, including contact information for RICHARD DUNDRE and a 'Cancelled On 8/2/2006' status. A 'Referral Request' form is open, titled 'Please Complete all boxes for Refund Request'. The form contains fields for Email Address (RDUNDRE@AOL.COM), First Name (RICHARD), Last Name (DUNDRE), Address (150 SCUDDERS LN, ROSLYN, NY 11576), Contact Phone Number (5166560577), Amount Charged (25.90), and Amount Tax (.78). The explanation field contains the text 'LEC credit reject'. A 'Save' button is located at the bottom of the form. The interface also includes a sidebar with navigation options like 'Customer Service' and 'Other', and a 'PROCESSED TRANSACTIONS' table with columns for Transaction Date, Description, Beginning Date, Ending Date, and Amount.

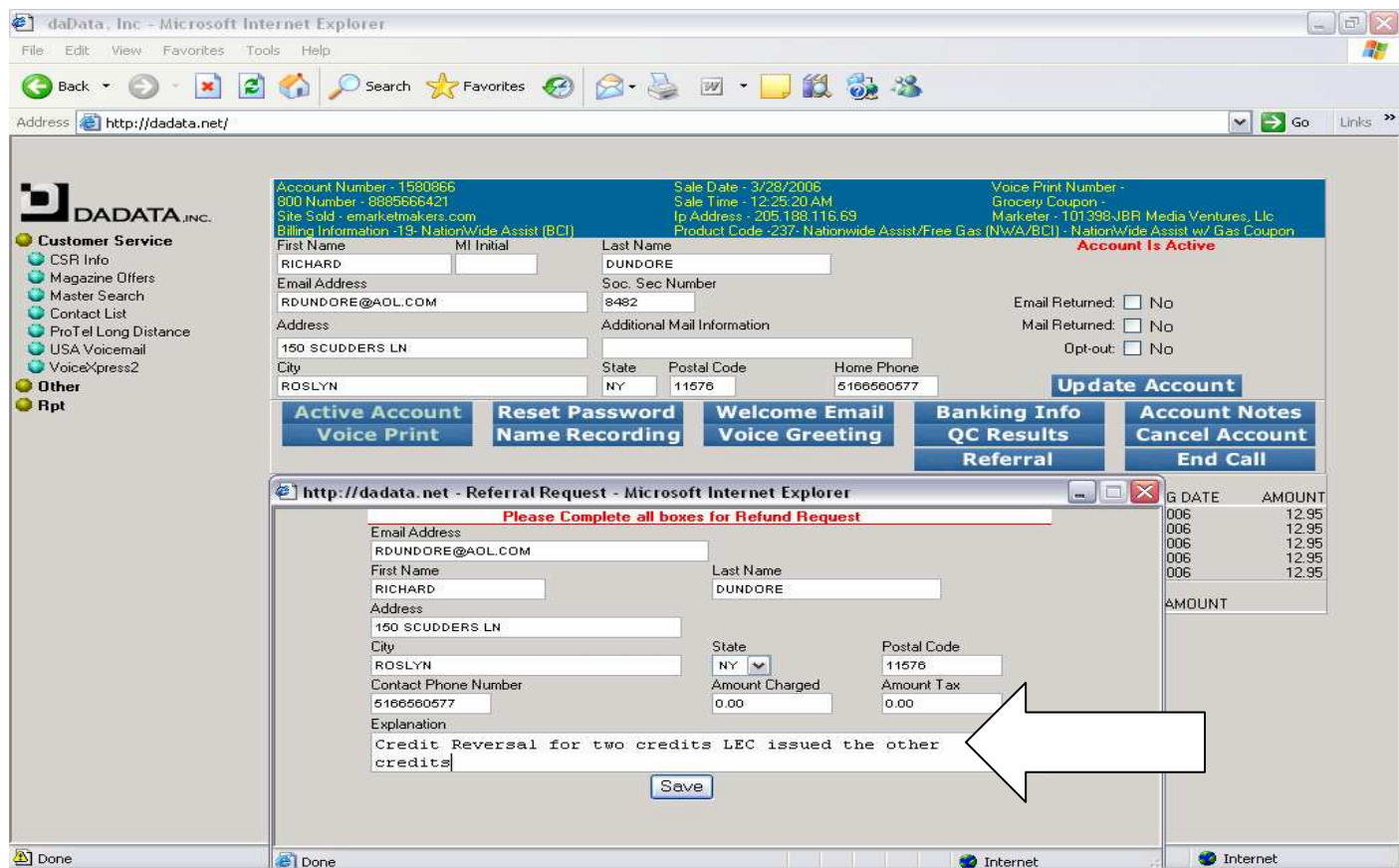
# Credit Reversals

The credit reversal request is used when you have issued credits and the customer then states he/she has already spoken to the billing company or LEC and they have already issued out the credits or when the telephone service has been disconnected or cancelled.

This should be prevented by asking the customer ahead of time if any credits have already been issued. The process for reversing credits is the same as any other inquiry. You would click referral and then click Inquiry.



Again, you would supply all the pertinent information needed to make this request. Please give the reason for the request. An example is provided below in the Explanation Box.



# Confirmation Requests

The Confirmation Request is processed as an Inquiry also. This is used when a customer requests a confirmation letter, e-mail, or fax be sent to them to confirm the cancellation and crediting of their account.

## Fax Request –

The note in the explanation box should include; the reason for the request, the contact name of the person receiving the fax, and the Fax number.

Example Note: Fax confirmation of CC attention Susan Smith fax number 000 123 1234 and number of credits issued.

## Letter Request –

The note in the explanation box should include; the reason for the request, the name of the person receiving the letter, the address, if different from the customer and the number of credits issued.

Example Note: Letter Confirmation of CC Susan Smith 123 Anywhere City, FL 32455 and the number of credits issued.

## Email Request –

The note in the explanation box should include; the reason for the request, the email address of the recipient, and the number of credits issued.

Example Note: Email confirmation of CC ssmith@wahoo.net and the number of credits issued.

The screenshot shows a Microsoft Internet Explorer browser window displaying the daData, Inc. website. The main page shows account details for Richard Dundore, including account number 1580866, sale date 3/28/2006, and address 150 SCUDDERS LN, ROSLYN, NY 11576. A red banner indicates "Account Is Active". Below the account details are several buttons: "Active Account Voice Print", "Reset Password Name Recording", "Welcome Email Voice Greeting", "Banking Info QC Results Referral", and "Account Notes Cancel Account End Call".

An inset window titled "http://dadata.net - Referral Request" is open, showing a form for a refund request. The form includes fields for Email Address (RDUNDORE@AOL.COM), First Name (RICHARD), Last Name (DUNDORE), Address (150 SCUDDERS LN, ROSLYN, NY 11576), Contact Phone Number (5166560577), and Amount Charged (0.00). The Explanation field contains the text "Confirmation E-mail, Fax, or letter". A large white arrow points to the Explanation field. A "Save" button is located at the bottom of the form.

DATE	AMOUNT
006	12.95
006	12.95
006	12.95
006	12.95
006	12.95

# Inconsolable Customers / Call Back Referrals

If a customer becomes so irate that you are unable to help them any farther, you would transfer those calls to the Executive Council Division. The Executive Council Division are specially trained CSR's that handle only the most irate and inconsolable customers. It is preferable for you to request a call back rather than a transfer if at all possible. If the customer insists to speak with someone right away and it is in between the hours of 9 am to 5 pm, Monday thru Friday, you would transfer those calls to the Dadata / Largo Call Center.

If it is any other time, you would advise the customer that you will have someone get back to them as soon as they are available. This is usually within 24 business hours. Please try to obtain any information needed by the Executive Council to return the call.

To Request a call back you would click on the referral button and fill it out as an inquiry. The information that must be provided is a correct contact name, phone number to call and the best time for them to receive the call back. If they are willing to give you the correct mailing address or verify that the mailing address is correct please provide that also, this is in case we need to mail them anything, for example a check.

The screenshot shows the daData, Inc. website interface. At the top, there's a navigation bar with 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below that is a toolbar with icons for Back, Forward, Stop, Home, Search, Favorites, and other browser functions. The address bar shows 'http://dadata.net/'.

The main content area is divided into several sections:

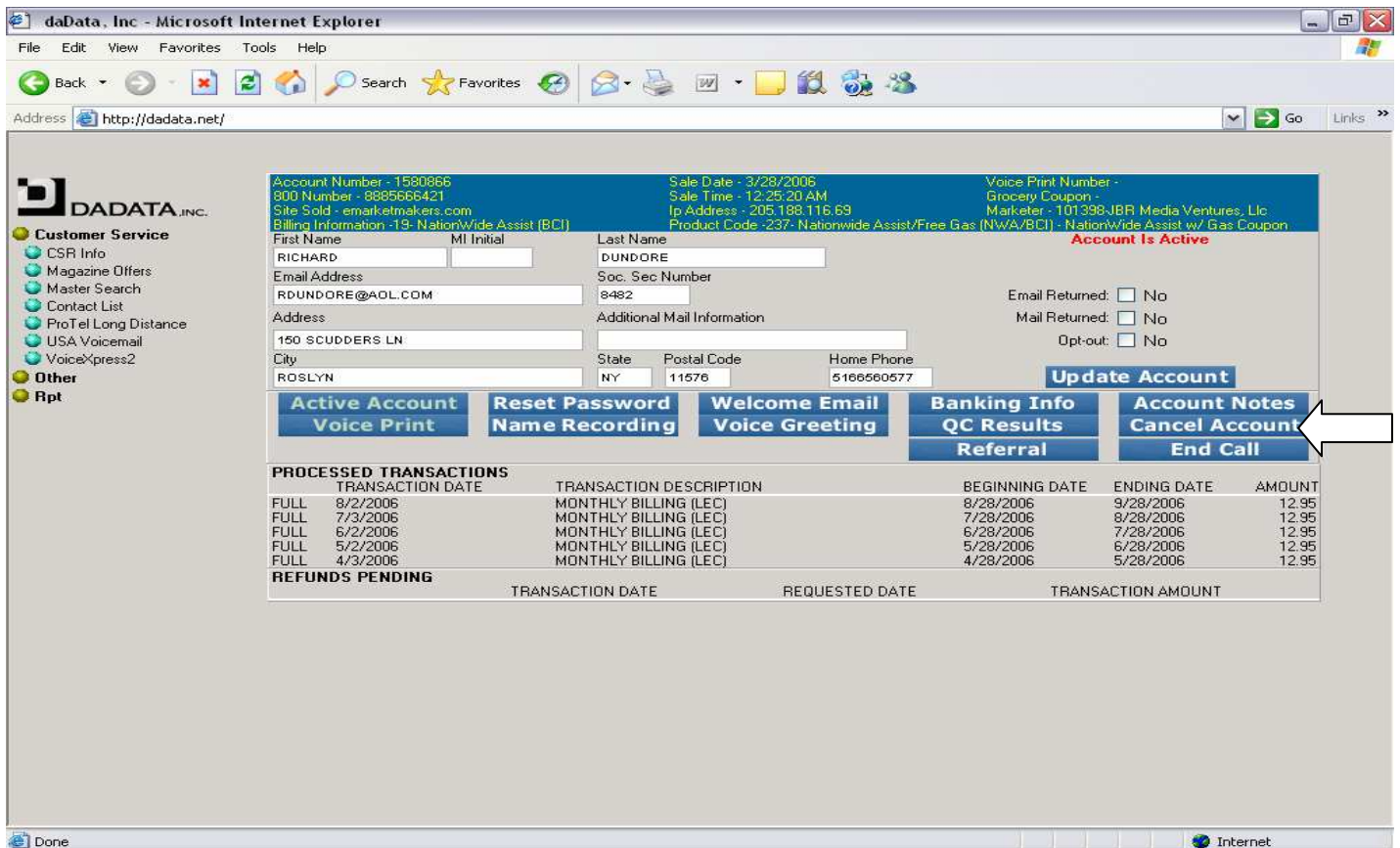
- Account Information:** Includes Account Number (1580866), Sale Date (3/28/2006), Voice Print Number, 800 Number (888568421), Sale Time (12:25:20 AM), Groceries Coupon, Site Sold (emarketmakers.com), Ip Address (205.188.116.69), Marketer (101398-JBR Media Ventures, Llc), Billing Information (19- NationWide Assist (BCI)), Product Code (237- Nationwide Assist/Free Gas (NWA/BCI) - NationWide Assist w/ Gas Coupon), and a status 'Account Is Active'.
- Customer Service:** A sidebar menu with options like CSR Info, Magazine Offers, Master Search, Contact List, ProTel Long Distance, USA Voicemail, VoiceXpress2, Other, and Rpt.
- Account Management Buttons:** A row of buttons including 'Active Account Voice Print', 'Reset Password Name Recording', 'Welcome Email Voice Greeting', 'Banking Info QC Results Referral', and 'Account Notes'. A white arrow points to the 'Referral' button.
- PROCESSED TRANSACTIONS:** A table with columns for TRANSACTION DATE, TRANSACTION DESCRIPTION, BEGINNING DATE, ENDING DATE, DATE, and AMOUNT. It shows several transactions with a date of 006 and an amount of 12.95.
- Referral Request Form:** A form titled 'Please Complete all boxes for Refund Request' with fields for Email Address (RDUNDORE@AOL.COM), First Name (RICHARD), Last Name (DUNDORE), Address (150 SCUDDERS LN, ROSLYN, NY 11576), Contact Phone Number (5166560577), Amount Charged (0.00), and Amount Tax (0.00). The explanation field contains the text: 'Requesting a call back best time to reach is 11 am'. A 'Save' button is at the bottom.

# Canceling the Account

You can process the account cancellation on the Personal Information Screen as shown below. Click on the Cancel Account button to process the cancel request. This will close the account immediately and notate the account that you processed the cancellation request.

**Note:** If customer is unknown to account holder you may only verify name, city and state. The account holder has the option of writing and/or faxing in for all information used to open the account in the online registration. If the discussion of fraud becomes an issue, explain to the customer that they may have entered the telephone number incorrectly and that you will process the cancellation. Assuring the customer that you have cancelled and credited all charges will normally make the customer feel secure that it was simply an error and not a stolen identity issue.

We never advise the customer to call the police or file fraudulent charges. Apologize for the inconvenience and assure them you have not only cancelled and issued full credit back to their account, but you will also be placing a block on the number so that Nationwide Assist cannot be signed up for again. If the customer requests additional information ask them to put their request in writing. They can mail, fax or email their request.



**Confirmation Code:** When we complete the cancellation and/or refund process we give the customer a confirmation code. This confirmation code is essentially the account number found at the top left hand corner. This information should be used if the customer writes to us for any reason as it helps us locate the specific account they are writing in about.

## How Do I Know When and How Much To Refund?

Refunds/Credits are issued on an account under very specific circumstances. CSR's are allowed to issue **3 credits** during the handling of an account. These credits include 2 past charges and the upcoming charge. The customer may or may not see the upcoming charge.

The CSR should ask the customer; **“What is the date of the charge you are calling about”** this will help them determine whether they need to advise the customer of the upcoming charge. If the customer does not know about the **upcoming charge** the CSR should advise them that they will see this charge on their next billing statement and assure the customer that they have **refunded** this charge, thereby preventing the customer from having to call the Call Center again. It is important to verify the billing date so they are aware of the date when they see it on their next months billing statement.

When a customer requests a refund you will need to determine which category the customer falls under. As we discussed in the previous section, the following refund policies apply:

- Did Not Authorize – **Refund ALL Money**
- Business Number – **Refund ALL Money**
- Household Member – **Refund ALL Money**
- Did Not Understand – **Up to 3 credits**
- Changed Mind – **Up to 2 credits**
- No Reason Given – **Up to 2 credits (Current & Upcoming)**
- Does Not Remember – **Up to 3 credits**

## What If The Customer Requests Further Credits Than What We Can Offer?

If the customer requests further credits you would advise them to write in to the Processing Center. They would be able to further assist them in receiving further credits. Explain that you are only authorized to issue the above stated credits for the situation.

If the customer is still not satisfied with your offer and begins to become irate, your Department Supervisor may take over the call and authorize further credits to the account. It is the discretion of the individual whether further credits should be issued.

## Processing The Refund(s) Back Through The Billing Company

Refunds are processed back through the billing company / LEC. It is imperative that you notify the customer before processing the refund that the refunds will be posted back to their telephone statement.

**Please establish with the customer that the phone is still connected and the LEC and/or billing company has not issued any or all credits.** We do not issue credits back to the LEC if credits were already issued by the LEC and/or billing company. The refund process takes 1-2 billing cycles before it appears on their statement.

### Telephone Tip:

I have processed (x) credits back to your telephone statement.  
Those credits will appear on your telephone statement within 1-2 billing cycles.

Locate Processed Transactions portion of the lower half of the Information screen. Click on **FULL** for each refund/credit that needs to be issued.

PROCESSED TRANSACTIONS					
	TRANSACTION DATE	TRANSACTION DESCRIPTION	BEGINNING DATE	ENDING DATE	AMOUNT
FULL	6/1/2006	MONTHLY BILLING (LEC)	6/27/2006	7/27/2006	12.95
FULL	5/1/2006	MONTHLY BILLING (LEC)	5/27/2006	6/27/2006	12.95
FULL	4/3/2006	MONTHLY BILLING (LEC)	4/27/2006	5/27/2006	12.95

The Processed Refund/Credit will be shown under the Refunds Pending portion of the transaction screen.

PROCESSED TRANSACTIONS					
	TRANSACTION DATE	TRANSACTION DESCRIPTION	BEGINNING DATE	ENDING DATE	AMOUNT
	6/1/2006	MONTHLY BILLING (LEC)	6/27/2006	7/27/2006	12.95
	5/1/2006	MONTHLY BILLING (LEC)	5/27/2006	6/27/2006	12.95
	4/3/2006	MONTHLY BILLING (LEC)	4/27/2006	5/27/2006	12.95
REFUNDS PENDING					
	REQUESTED DATE	TRANSACTION DATE	TRANS AMOUNT	TAX AMOUNT	
	6/22/2006	6/1/2006	(\$12.95)	\$0.00	
	6/22/2006	5/1/2006	(\$12.95)	\$0.00	
	6/22/2006	4/3/2006	(\$12.95)	\$0.00	

The refunds have now been requested. On the fifth business day the credit request will be scooped by the IT Department during their file transfers to the billing company. Once the credit is actually processed you will see the credits reflect on the account as shown below.

PROCESSED TRANSACTIONS					
	TRANSACTION DATE	TRANSACTION DESCRIPTION	BEGINNING DATE	ENDING DATE	AMOUNT
	6/23/2006	REFUND MONTHLY BILLING (TRNCODE 14)	5/27/2006	6/27/2006	-12.95
	6/23/2006	REFUND MONTHLY BILLING (TRNCODE 71)	6/27/2006	7/27/2006	-12.95
	6/23/2006	REFUND MONTHLY BILLING (TRNCODE 71)	7/27/2006	8/27/2006	-12.95
	6/1/2006	MONTHLY BILLING (LEC)	6/27/2006	7/27/2006	12.95
	5/1/2006	MONTHLY BILLING (LEC)	5/27/2006	6/27/2006	12.95
	4/3/2006	MONTHLY BILLING (LEC)	4/27/2006	5/27/2006	12.95
REFUNDS PENDING					
	TRANSACTION DATE	REQUESTED DATE	TRANSACTION AMOUNT		

## Reversing Refund Requests

You have issued credits through the system and now the customer has advised you:

- I no longer have this telephone number or
- My LEC and/or billing company has already issued the credits

Because you have already initiated the request you now have to notify Dadata / Largo, FL Call Center immediately to cancel the refund(s). You can do this by using the Customer Service Referral System. This allows you to make an online inquiry or notification directly to Dadata so that they can process the cancellation. Follow the process below to create a request to cancel credits:

- Click the REFERRAL bar on the account screen
- A REFERRAL BOX will pop up on the screen

- Click on INQUIRY
- Enter the reason for the cancellation of the refund/credits in the Explanation box
- Click on Save

The inquiry will then be processed directly to the Dadata / Largo queue which they monitor all throughout the day.

**Note:** Cancellation Requests must be completed within 24 hours of the crediting. If Dadata is not notified to cancel the credit it will be processed and we will have no way to cancel it, resulting in the customer receiving twice as many credits than what is due to them.

## So How Do I Refund Money If I Can't Process It Through The Billing Company?

When we are unable to process the refund through the standard refund process we request a paper check to be processed and mailed to the customer. This process takes more time with the customer, especially if the name and address are not the same as the account.

Follow these steps when requesting a paper refund:

- Click the REFERRAL bar on the account screen
- A REFERRAL BOX will pop up on the screen
- Click on Check Request
- Verify name and address
- Enter amount of Refund/Credit
- Enter amount of Tax to be refunded/credited
- Enter Explanation/Reason for request
- Click on Save

The request for the paper check is forwarded to the Dadata / Largo queue and processed each day. Once they have reviewed the request and verified the information they will approve the request.

Accounting will process a paper check with the name and address as entered by the CSR. It is imperative that the name and address be verified for spelling and accuracy to eliminate incorrect refunds to the wrong person or return mail because the address is not correct. It will take approximately 7 to 10 business days for the customer to receive their check in the mail.

## LEC Credit & Debit Issues

The telephone service providers **LEC (local exchange carrier)** sometimes issue adjustments, return monthly billings or give refunds/credits to the customer's on their accounts. When this occurs the CSR must know what each of these terms mean in order to correctly refund/credit the account. Please review the different adjustment types listed below. We will review what they look like during our training and how to handle them.

- LEC Credit Reject** – the telephone service provider has **rejected** the **refund/credit** that we have issued to the customers account.

When this happens you will need to request a paper check request.

- Monthly Fee Refund Reject** – the telephone service provider has **rejected** the **refund/credit** that we have issued to the customers account.

When this happens you will need to request a paper check request.

- ❑ **Return Monthly Billing (LEC REJECT)** – the telephone service provider has **returned the billing (charge)** that we processed to the customers account.
- ❑ **LEC Adjustment** - the telephone service provider has issued an adjustment to the customers account. This can be due to complaints made directly to the LEC or because the customer has not paid the charge.

## Ending the Call

Calls are STROKED out at the end of the call by the CSR using specific keystrokes. These keystrokes allow management to monitor product statistical information. The following procedure will enable the CSR to end calls correctly.

- ❑ Click the End Call button on the information screen.
- ❑ Click Telephone under Type of Service.
- ❑ Choose the scenario that best describes the call.

**Please Note:** If you have verified the name, address and email address and all information matches with the caller you should always mark "Info Verified" as part of your end call procedure. This information assists us further if we received written correspondence or additional requests for information.

Also note that you can click on more than one type of inquiry if needed. Such as Cancel Account (Did Not Understand) and Request Refund.

The Voicemail2 wording in the Account Notes should always remain intact as this designates the database.

daData, Inc - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: <http://training.vmcallscenter.com/>

Main Menu

**TYPE OF SERVICE**

- TELEPHONE
- TELEPHONE (SPANISH)
- CORRESPONDENCE
- QUALITY CONTROL
- LEC DISPUTE
- AGENCY

**TYPE OF INQUIRY**

- GENERAL ACCOUNT / NO CHANGES MADE
- EMAIL RETURNED
- CHANGE OF GENERAL INFORMATION
- CHANGE OF BILLING INFORMATION
- QUALITY CONTROL CANCEL
- QUALITY CONTROL REFUND
- CALL FORWARDED TO EXECUTIVE COUNCIL
- INFO VERIFIED
- REQUEST REFUND
- MISC NOTE
- CANCEL ACCOUNT (DID NOT UNDERSTAND)
- CANCEL ACCOUNT (CHANGED MIND)
- CANCEL ACCOUNT (DID NOT AUTHORIZE)
- CANCEL ACCOUNT (NO REASON GIVEN)
- CANCEL ACCOUNT (BUSINESS NUMBER)
- CANCEL ACCOUNT (HOUSEHOLD MEMBER)
- CANCEL ACCOUNT (DOES NOT REMEMBER)
- RE-INSTATEMENT OF ACCOUNT
- REQUEST TO CHANGE PASSWORD

Account Notes:"

VoiceMail2

Finish Call

Done Internet

## Making Notes on the Account

Notes are a very important part of closing an account. They document important information or events that occurred during a customer call. They are used by other CSR's if the customer calls back. Compliance and Services utilize them should a complaint be registered by the account holder/customer to make sure the call was handled professionally and that everything was done according to company policy.

The following are some examples of what types of information should be documented in the Note Area of the End Call screen.

- ❑ The Account Holder/Customer information does not match – If possible the CSR should notate the correct name and address of the Account Holder.
- ❑ The address is updated – the CSR should notate the original address in the notes, so that if a question arises later we can verify what information was changed and why.
- ❑ The Account Holder knows the customer but did not authorize the charges – the CSR should document the relationship of the customer to the account holder.
- ❑ The number charged belongs to a Business – the CSR should document the business name, address, and the name of the person calling.

**Note:** Please be advised that your notes should be short and understandable. Do not write long or extensive notes in the system when not necessary. Please also be advised that your notes are read by all members of our company and can in some instances be requested by regulatory agencies. So it is imperative that the notes be professional and informative. At no time should profanity be used in the notes.

If you have a customer who is irate and causes issues and you feel that this information should be noted in the system, please refrain from using descriptive notes in doing so. It is acceptable that you note that “the customer was unhappy with this situation” or “call not handled in a satisfactory manner for the customer.” These notes will allow management and other CSR associates to understand that the call did not go well.

## Definition of Strokes

### Stroke Key

**Type of Call:** This section defines how the inquiry was received and allows us to monitor how the customer contacted us.

- Telephone:** Used to define an incoming telephone inquiry.
- Telephone Spanish:** Used to define an incoming Spanish telephone inquiry.
- Correspondence:** Used by the Correspondence Associates in the Dadata / Palm Harbor Office when working incoming mail and faxes.
- Quality Control:** Used for Quality Control issues only.
- LEC Dispute:** Used when processing disputes received directly from a LEC or the billing company.
- Agency:** Used when processing disputes received directly from a regulatory agency.

**Type of Inquiry:** This section defines the type of inquiry and allows us to track specific cancellation reasons as well as service issues.

- General Account / No Changes Made:** Used when only reviewing an account and no action is required.
- Email Returned:** This is used in the Dadata / Palm Harbor Office when processing return email such as welcome letters and general correspondence.
- Change of General Information:** This is used when the customer requests an address change or email update.
- Change of Billing Information:** This is used when the customer requests us to change the billing telephone number.
- Quality Control Cancel:** This is used by the Quality Control Group only.
- Quality Control Refund:** This is used by the Quality Control Group only.
- Call Forwarded to Executive Council:** This is used when a referral is requested for a pending issue or the customer is requesting a call back.
- Info Verified:** Used to note that the information has been verified with the caller and matches.
- Request Refund:** Used to note that a refund was requested.
- Misc Note:** Used to enter manual notes when the standard strokes do not apply.
- Cancel Account (Did Not Understand):** Used when the customer requests to cancel because he or she did not understand the service or the billing method.

- ❑ **Cancel Account (Changed Mind):** Used when the customer requests to cancel because he or she simply changed their mind and no longer want the service.
- ❑ **Cancel Account (Did Not Authorize):** Used when the customer contacts us due to billing information. The information does not match and the customer states that he or she did not authorize the service.
- ❑ **Cancel Account (No Reason Given):** This is used when the customer simply calls or writes in to cancel the service. If no explanation is given and no credit is requested.
- ❑ **Cancel Account (Business Number):** This is used when a business associate or owner calls in and an associate or someone they do not know has used their telephone number for billing purposes without authorization.
- ❑ **Cancel Account (Household Member):** Used when the person is known to the account holder but not authorized to bill to the telephone number. This includes but is not limited to a spouse, sibling, children, parents, cousins, neighbors, etc.
- ❑ **Cancel Account (Does Not Remember):** Used when the customer information matches and the customer does not remember signing up or states that he or she did not sign up.
- ❑ **Reinstatement of Account:** This is used when the customer has previously cancelled the service and now wishes to reopen the service.
- ❑ **Request to Change Password:** Used when the customer calls in and does not remember his or her password and you reset the password.

## Power Failure / System Failure

At times it may be necessary to take the Dadata Application down due to weather or technical issues with the system. Planned outages are normally done during off hours or weekends, however should we need to take the system down during ADC's schedule work hours we will work accordingly with ADC and give as much notice as possible.

In Emergency issues where we have experienced an unplanned outage due to weather or a technical problem, we will again contact ADC as soon as we are notified of the problem. Elizabeth Boyle, Dadata will work directly with Jennifer Baumhover, ADC to implement a recovery process.

In most instances if the Dadata Application is down we will simply advise the customer that due to technical / weather conditions our services have been interrupted and they should attempt to re-contact us for assistance. We will normally try to give a return call time frame such as 2-hours or within 24-business hours, etc.

## Error Received

At times you may receive an error while processing on the Dadata Application. The CSR should attempt to logout and then log back in. If the whole floor is receiving errors, again each CSR should log out and then log back in. This should correct the issue, however if the errors continue ADC should contact Elizabeth Boyle at Dadata. If the call center is unable to access records due to an error they will revert to the system failure process until we can correct the issue or confirm how long we will be down correcting the issue.

This type of error is usually a sporadic issue that happens as part of web processing and will usually correct itself within a few minutes.

## Helpful Scripting When Training:

Thank you for calling Nationwide Assist. My name is \_\_\_\_\_. May I have your phone number with the area code first please?

One moment please...

May I ask whom I am speaking with?

### **If the Name Appears the Same**

Ok and how may I help you today Mr/Mrs \_\_\_\_\_?

#### **(If the customer asks, what the charge is for and how it got on their bill)**

Ok, no problem I can explain that to you, this was an online registration that was filled out on a website called \_\_\_\_\_com/.net, what we provide is a stand-alone 800 number with a voice mailbox. This was the phone number provided for billing.

Is this something you did not intend to register for?

#### **(If they reply no)**

Ok, that's not a problem. What we can do for you today is go ahead and cancel this service and issue credits. Can you verify your address for me please? Thank you so much. And what is the date of the charge you are currently looking at?

Ok one moment please.

#### **(Look At Dates and Charges. Depending on the date they give depends on how many credits we issue. If they give you the date before the most recent, warn them of upcoming charge. Please follow Cancellation/Refund Recap that is provided.)**

Ok, so what I can do for you today is cancel the account, and issued full credit for the dates of \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_; please be aware that \_\_\_\_\_ may be an upcoming charge that will be showing up next month on your bill but I'm issuing a credit for it now. It takes about one to two billing cycles for the credits to appear on your phone bill.

#### **(If the customer says Thank You say)**

It was my pleasure. And I do have a confirmation number for you if you'd like to write that down. Just let me know when ever you're ready. Ok Great! Your confirmation number is \_\_\_\_\_. Is there anything else I can help you with today?

#### **(If the customer asks what the confirmation number is for you say)**

"It's to confirm that we have cancelled and issued credits to your account."

#### **(If the customer is aware that they have more than three charges and request all the credits. Say...)**

I apologize, I am only authorized to issue three credits per a telephone request but I'd be more than happy to provide you with the mailing address or fax number so you can request the Processing Center to review your account for additional credits. Which would you prefer? The mailing address or fax number?

Not a problem, the mailing address is [Processing Center P.O. Box 15634 Clearwater, FL 33766](#).  
The fax number is [866-227-4201](#).

When you send in that request, it must include... your name, mailing address, phone number being charged, the reason for the refund, and the confirmation number that I'll provide you with now. Just let me know whenever you're ready.  
**(If the customer says Thank You, say...)**

It was my pleasure. Is there anything else I can help you with today? Ok, Great! You're all set. Have a wonderful day.

### **If the Names Appear Different**

May I ask do you know someone by the name of \_\_\_\_\_?

#### **(If last name is the same)**

And how is \_\_\_\_\_ related to you?

#### **(If they know the person)**

Is \_\_\_\_\_ authorized to make changes to this phone bill?

#### **(If they do not know person, go straight into the registration process and service explanation)**

This was an online registration that was filled out on a website called \_\_\_\_\_ .com/.net, what we provide is a stand-alone 800 number with a voice mailbox.

This was registered in the name of \_\_\_\_\_. We understand this is an unauthorized charge because you have stated you do not know this person. What I have done is cancelled this service and I will be issuing full credit to this account. How long have you had this phone line?

#### **(Issue credits from the month they began service, if a shorter time has been charged then issue full credit)**

The credits I have issued are for the dates of \_\_\_\_\_, \_\_\_\_\_, (examples, May 16<sup>th</sup>, June 17<sup>th</sup>, and July 17<sup>th</sup>...and so on.)

May I please have your correct contact information in case we need to reach you?

Thank you so much. Again, I do apologize for the inconvenience but I'm glad we got this resolved for you today and I do have a confirmation number for you, if you'd like to write that down? Just let me know whenever you're ready. Ok, Great! Your confirmation number is \_\_\_\_\_.

#### **(If the customer says Thank You)**

It was my pleasure. Is there anything else I can help you with today?

Ok, Great! Have a wonderful day.

#### **(If they do know person and they are not authorized to make changes go straight to registration process and service explanation.)**

Ok, this was an online registration that was filled out on a website called \_\_\_\_\_ .com/.net, what we provide is a stand-alone 800 number with a voice mailbox. It was submitted in \_\_\_\_\_ name and this was the phone number provided for billing.

Is this something you'd like to discuss with \_\_\_\_\_ or would you like me to cancel this off your phone bill now?

OK, Not a problem, so what I can do for you today is cancel the account, and issue full credit for the dates of \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_; please be aware that \_\_\_\_\_ may be an upcoming charge that will be showing up next month on

your bill but I'm issuing a credit for it now. It takes about one to two billing cycles for the credits to appear on your phone bill. I do have a confirmation number for you if you'd like to write that down. Just let me know when your ready.  
Ok, Great! The number is \_\_\_\_.

**(If the customer says Thank You say)**

It was my pleasure. Is there anything else I can help you with today?

**(If customer says no...)**

Ok, Great! You're all set then. Have a wonderful day.

**Business Accounts**

Get the name of the person you are speaking with, the name and address of the business and try to establish if the person who applied for the account is an employee or not.

We issue full credit unless the business owner is the one who signed up for service, owners of businesses that sign up for our service will fall under the standard closing and credit process.

**Cancelled accounts**

After you get the telephone number and you see that the account is cancelled:

Ask the customer to "please hold" or "wait one moment please" then...

**READ YOUR SCREEN AND OPEN YOUR NOTES BEFORE YOU SAY OR DO ANYTHING ELSE...**

Familiarize yourself with the notes and the status of the account, such as when they were cancelled and when the credits were processed. Make note of any LEC cancelled or rejects as this may be why the caller is contacting us again.

This will help you handle the call more efficiently once you begin to assist the customer.