



Cancellation Prevention Checklist & Conversation Builder

Staff Member Name _____ Today's Date _____

PRE-CALL PLAN & CONVERSATION BUILDER

Name of Person Canceling: _____ Date of request to cancel _____

Business Name: _____

Location: _____ What is the best time to call: _____

How long have they been a member: _____ Membership Lifetime value: _____

Products bought: _____

Free resources received: _____

Events attended: _____

Why this member matters to me: _____

NEVER HAVE A CONVERSATION WITHOUT AN OFFER

What possible offers can I make? _____

Good offer: _____

Better offer: _____

Best offer: _____

What is the pain of disconnect? _____

NEVER HAVE AN OFFER WITHOUT A DEADLINE

Deadline: I need to know before [insert date] _____



HAVE THE CONVERSATION

Get to the heart of the matter.

CONVERSATION BUILDER

SMILE

Hey [member name], this is [your name], and I'm calling from [insert your business name] and I received a note saying you had a question about cancelling.

[PAUSE AND LET THEM RESPOND]

I see that you've been a member for [insert length of time] and have [insert the products, resources, events]

[PAUSE AND LET THEM RESPOND]

I've found that when people request to cancel it's usually because of some difficulty they're experiencing.

What are they saying with their heart - What emotions are they experiencing?

What are they saying with their head - What is their thought process?

KEEP SMILING!

[Don't be afraid to put them on hold.]



CONVERSATION CHECKLIST

- ☐ I see that you've been a member for [insert length of time] and have [insert the products, resources, events]
- ☐ Feel / Felt / Found
- ☐ Inflict the pain of disconnect
- ☐ Make the offer
- ☐ Ask them to stay

AFTER THE CONVERSATION

☐ Follow up on the conversation via email

☐ Invite them back

☐ Restate the offer and benefits

☐ Follow up on the deadline

☐ Inflict the “pain of disconnect”

☐ Give them a call to action

REACTIVATION CAMPAIGN

☐ Include them in all on-going marketing.

☐ 45 Day Follow-up Call: Just checking in. . .

Lead with the heart – how’s it going?

Challenge their “head” – what if we could help you [insert their challenge]

☐ 90 Day - Offline Mailing: “We Want You Back Mailing”

Follow up by email “Did you get it?”

Always leave an open door.