



Why People Quit

Tool #1: Cancellation Prevention Checklist & Conversation Builder

Scott: Welcome to this final session on additional tools that you can use. Now, I'm going to give you eight tools that you can use along with the steps that I have already laid out for you, that will further equip you to keep people from canceling their membership. The very first one, and probably and one of the most valuable tools in this entire package, is the cancellation prevention checklist and conversation-builder. If you haven't already done so, go ahead and print that out, and let's walk through it together.

So, you've got the cancellation prevention checklist and conversation builder. Let me just say immediately upfront, I want you to have every person who processes a cancellation to utilize this checklist and conversation builder. There's a number of reasons for it. One, it builds accountability. I want you to be able to make sure that every person in your business is following up with members who are requesting to cancel in the correct manner and in a unified manner.

I want every person in your business to be equally trained, to be equally equipped, and this checklist and conversation builder is going to help them. Most often, what I've seen is what happens in membership businesses is that you tell people to go process cancellations, but you really don't know how to process it yourself, and so you're kind of hoping they'll figure it out as well. I want you to have a training tool for every employee. I want you to have a training tool for yourself, to where you can go, step-by-step, and have this checklist for every person who cancels.

I really do want you to utilize this, not just have it printed out for every employee, but utilize this checklist for every business or every person who's requesting to cancel your membership. If you're going to go through all of the opportunities to have that pre-call plan, or



pre-call prep, I want you to know and have it as a checklist that you can mark off. This ought to create a report for you of every person who's canceled and who canceled them.

This checklist is really invaluable. And that's why at the very top it says, "Staff Member Name." I want to know who the staff member is that processed this cancellation. Then it has, "What is today's date?" So, I want to know the date that it was processed.

Then, the next section you'll see, it's the pre-call plan and conversation builder. It's the steps that I laid out for you as part of the pre-call plan. What is the name of the person canceling? What is the date of their request to cancel? What's their business name, location? What is the best time to call? How long have they been a member? This is where we start building from our pre-call plan.

This is where we are able to know, how long have they been a member? What's the membership lifetime value? The products that they bought. The free resources that they received. The events they attended. Why this member matters to me. Imagine every employee that you have. Every person who's processing cancellations writing down and personalizing why this person, this member matters to them.

Next, is the never have a conversation without an offer. So, let's start building the conversation. Let's articulate our pre-call plan. What are the possible offers I can make? Well, I've got the good offer, the better offer, the best offer. You know, maybe there's a possibility of offering a free registration at an event, or, a free resource. Maybe it's the opportunity to give them a month at half price or two months at half price. Or three months ... or, I'm sorry two months free. So, you begin to outline those offers and write those down on this checklist.

Then, identify the pain of disconnect. What are they going to lose by canceling their membership? And write that down on this checklist. So, again, this checklist, you're starting to see it now, all of the pre-call planning is actually in this checklist. It gives you a step-by-step

process taking all 10 steps that I outlined for you and puts it into this checklist.

Next, never have an offer without a deadline. So what is the deadline that I'm going to have? What is the deadline that I want to know by? Have them write that down. Then, the conversation builder. Just a reminder: Smile. Smile. And then this is an opportunity for you to utilize this checklist. And there's some conversation builders that I put in there reminding people about what are they saying with their heart? What are they saying with their head? And then they keep smiling.

But then there's another tool. It's tool number two, we'll talk about in the next segment. And that's the script builder. So you might be able to pull that out, and have the script-builder, and be able to write down parts of the script builder onto this checklist. So, you've got the checklist here, you're in the conversation builder, and then I want you to have the conversation checklist. I see that you've been a member for ... insert the time. And you have certain products, certain resources. They did that. Okay. The feel, fell, found method. The inflicting of the pain of disconnect. They made the offer, and they asked them to stay.

Here's what you're doing. You're asking every employee, every person who processes a cancellation to check off that they did these things. Now, let them know, that hey, this is a new process. You know, sometimes they might not be able to do that. They might forget. But they should have this in front of them. And they'll be able to check it off. They say, you know what? I forgot. I forgot to ask them to stay. So, you know, next time I can improve upon it. Have that checklist there, and have them check off the steps that they took.

After the conversation, you, as the membership business owner, you want to know that every employee, every person processing a cancellation followed up the conversation with an email. Have them

check that off. Did they invite them back? Did they restate the offer and benefits? Did they follow up on the deadline? Are they inflicting the pain of disconnect? Give a call to action. Again, you're asking every employee to check off that they completed each of these steps.

Then next, you have the reactivation campaign. Is that employee including them in all ongoing marketing? Is that employee including that there's a 45-day follow up call, just checking in. The 90-day off line mailing that there's this reactivation campaign that people are being put into so that we've got a process in place, and we're doing everything we can to keep people from canceling.

And then always, always, you see it as a last line there. Always leave an open door. So, what I did for you is I took each of those 10 steps, I collaborated it into a checklist that you can have and a conversation builder so that your employees and you will have some immediate tools that you can have. When somebody requests to cancel their membership, you just pull out this checklist and start the process. Answer the questions.

Then, after you've done your pre-call planning on this checklist, and conversation builder, give them a call and go through your conversation, and then you've got your checklist for after the conversation. This is one of the most invaluable tools that you're going to be able to use, plus it'll help you keep everyone in your membership business accountable to doing what's in the best interest for your members.