

The Ultimate Cancellation Checklist

Step 1: Have a "Pre-Call Plan"

- ☐ Know "WHO" is canceling.
 - ☐ How long have they been a member?
 - ☐ What products, events and/or resources they've bought.
 - ☐ Know what time zone they're in.

Additional Prep: Prepare for a voicemail.

Step 2: Prepare to Make an Offer

If they're in trouble, tension or transition, make them an offer!

- ☐ Half-price month?
- ☐ Half-price two months?
- ☐ Free month?
- ☐ Tool or resource?

Step 3: Have a Conversation With Them!

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 your membership.

What can I do to help?

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

[See below for examples]

Step 4: Make the Offer & Ask Them to Stay!

Tie the offer back to how it will help them overcome their trouble, tension or transition.

"If I could make this happen, would you be interested in keeping your membership?"

Step 5: Always Follow-Up By Email!

Email Subject: Recap our conversation

Confirm their cancelation or the offer that they accepted.

THANK & INVITE them back!

Voicemail Scripts and Sample Emails

Voicemail Script

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 your membership.

If you would, please call me back at [Your Phone Number] or, simply reply to this email and let me know when a good time to call would be.

Talk soon,

[Your Name]

Voicemail Follow Up Email - Sent IMMEDIATELY After Voicemail

Subject: Question about your membership...

I just left you a voicemail. [Owner/coach] sent me a note saying you had a question about your membership.

I want you to know that people matter more than your membership. I call everyone who signs up and who cancels. The last thing we want to do is abandon a member who is going through some sort of difficulty.

We want to help!

Please let me know by calling (561) 826-4624 or just reply to this email and let me know when would be a good time to talk.

Talk soon!

[Your Email Signature]

Sample Call & Email

Hey Bonnie, this is John Donahue, and I'm calling from Scott Whitaker and Membership Accelerators Club and I received a note saying you had a question about your membership.

If you would, please call me back at (561) 826-4624 or, simply reply to this email and let me know when a good time to call would be.

Looking forward to talking soon!

Subject: Question About Your Membership...

Hey Bonnie,

I just left you a voicemail. Scott sent me a note saying you had a question about your membership.

I want you to know that people matter more than your membership. I call everyone who signs up and who cancels. The last thing we want to do is abandon a member who is going through some sort of difficulty.

We want to help!

Please let me know by calling (561) 826-4624 or just reply to this email and let me know when would be a good time to talk.

Talk soon!

--

John C. Donahue

Dir. of Marketing & Community Manager
Membership Multipliers

When Someone Does Not Respond

Subject: About your membership... (Sent if they do not respond)

Hey [Member Name],

The reason for my call and email is that I wanted you to know that people matter more than your membership. I call everyone who signs up and who cancels.

Just wanted to see if there was some sort of “trouble, transition or tension” and if so I was going to offer [your offer] to try and help. The last thing we want to do is abandon a member who is going through some sort of difficulty.

Per your request, I’ve canceled your membership.

Just know, you’re valued and you’re welcome back at any time.

[Your Email Signature]

Sample Email

Hey Bonnie,

The reason for my call and email is that I wanted you to know that people matter more than your membership. I call everyone who signs up and who cancels.

Just wanted to see if there was some sort of “trouble, transition or tension” and if so I was going to offer you a free month to try and help. The last thing we want to do is abandon a member who is going through some sort of difficulty.

Per your request, I’ve canceled your membership.

Just know, you’re valued and you’re welcome back at any time.

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