



Deal Failed Guidelines Procedure

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Issued by: Silviya Angelova

Departments: All

Start date: 07APRIL2016

End date: Until Further Notice

Purpose and Scope

This procedure explains what will be the process for accounts with critical misreps and Customer Status “Deal Failed Guidelines”. This way we'll be more proactive with the customer and not just letting him think he signed up with us and he should expect services.

The scope of the procedure is for all sales done in the company, including affiliates.

Description

1. If an account is “Deal Failed Guidelines” for the first 15 days, the manager of the sales team or affiliate will try to call the customer to fix the issue.
 - a. If during these first 15 days the customer calls in to cancel, the call must be transferred to the respective sales team manager
 - b. If a customer sends a cancellation request through text, e-mail or fax within the first 15 days, a task must be created by the person who received the cancel request and assign it to the sales team/affiliate manager to call the customer.
2. When sales agent speaks with the customer a task has to be set to QA Deals Team Lead to reevaluate the deal.
 - a. If misrep is confirmed to be corrected, then QA releases the deal and enter in CRM “Date Agent Passes” with the date of the deal fix. Accounting changes the billing date to the date that the misrep was corrected. Accounting and ADv Tech has only 24 hours to push back a deal for additional misreps/guideline deviations.
 - b. If spoken to the customer and issue can't be fixed, QA Deals Team Lead has to create a TT to Accounting to cancel the deal with “Deal Failed Guidelines” reason.
 - c. If misrep is confirmed to be corrected, but an additional one came after it, QA TL is to create a task and email to sales team/ affiliate manager with the new misrep.

3. If deal is not fixed after 15 days since the account became “Deal Failed Guidelines”, CRM will automatically cancel the deal with the reason “Deal Failed Guidelines”. CRM then will send an [email](#) to the customer and generate an invoice with the subject line “Final Bill” that has a zero balance on it.

Change	Suggested By	Approved By	Date of change
Accounts will be canceled on 15th day after the deal was closed with cancel reason DFG	Teodora Doynova	Silviya Angelova	4/07/2016
Added ”1.b If customer sends a cancellation request through text, e-mail or fax within the first 5 days, a task must be created for sales manager (Albert) to call the customer.”	Dennis Tuwahan	Silviya Angelova	8/8/2016
Changed 1.b. to “If customer sends a cancellation request through text, e-mail or fax within the first 5 days, a task must be created for sales team/affiliate manager to call the customer.”	Roumen	Roumen	8/16/2016
Added “2.b If customer sends a cancellation request through text, e-mail or fax between the 5th and 10th day after the payment of the set up fee, a task must be created for sales support agent (Philip White) to call the customer.”	Dennis Tuwahan	Silviya Angelova	8/8/2016
Changed 2.b to “If customer sends a cancellation request through text, e-mail or fax between the 5th and 10th day after the payment of the set up fee, a task must be created for Retention to call the customer.	Roumen	Roumen	8/16/2016
Procedure now applies for all Sales departments and affiliates, that work with bringing new customers.	Roumen	Roumen	8/16/2016
Removed SS calling the DFG between days 6-10 to fix the issue. Added 10 days for closers to try to fix a deal instead of the 5 days so far.	Roumen	Roumen	2/8/2017

Changed paragraph 1. Sales department will have 15 days to call DFG accounts instead of 10 days	Roumen	Roumen	5/30/2017
Added “Accounting and ADv Tech has only 24 hours to push back a deal for additional misreps/guideline deviations.” and “and email” on Description a. & c.	Hermann Calero	Silviya	10/28/2019
Per email from Valentin sent on 27 Feb 2023, CRM will automatically change the deal stage from DFG to Canceled if the DFG is not Fixed ater 15 calendar days	Milen Tonev	Silviya Ang...	Jan 9, 2024