Policy for Changing NAP

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Departments: All
Start date: 01DEC2016
End date: Until Further Notice
Approved by: Roumen Todorov

Purpose and Scope:

This policy sets expectations about the way we change NAP.
It regulates the process in the CRM and between departments to support the retention of customers and the incentives given to affiliates and employees for retention.

The elements of NAP

- Name
- Address
- Phone number

Additional elements

- Industry

1. For change in **Name** and/or **Phone**:
    a. Create TT to the Advertising Department to make the change.

2. For changes that include **Address** and/or **Industry** (this will apply for changes in Name and Address or Phone and industry etc.) In this scenario we might have **change in MRC**:
    a. Create TT to Advertising Department to process the change in address;
    b. Create New SA (sales agreement) and procure an “I Agree” from customer using free text or email (reach out to upsells manager for assistance)
    c. Create TT to Accounting to process change in price.

3. For changes that involve all 3 NAP elements **(Name, Address and Phone number**):
    a. Transfer to upsells
    b. Cancel the old account with reason “Cancel due to new deal”;
    c. Create new account for the new information.
    d. The new deal should be credited to the same department/partner that has sold the initial deal.

e. The setup price of the new deal should be $0.00. Such deals will not allocate commission or spiff payment. The rep who changed all 3 NAP should read the verification script again.