

Cancellation Process

Accounting will be responsible for managing the process from start to finish. Upon receiving a phone call from a customer requesting to cancel their account with VinSolutions, a case will be opened to track the process. Accounting will immediately give the call to the Regional or any member of the Sales management team to ensure voice contact with the customer.

All correspondence between the customer, sales, accounting and support will be documented into the case. The regional will be tasked to "Save the Account" and will be given 10 days to do so. An email will be sent to the Director and VP of Sales alerting them that a regional has been tasked in saving an account. At the end of the 10 days accounting will review the case and reach out to the Regional to let them know they will begin sending the cancellation documentation unless progress is being made to save the account and more time is needed. Accounting will discuss any needed time with the Sales Management team.

New Case Closed Statuses (Closed Saved, Closed Lost) have been added to assist in providing metrics on how many accounts we save versus lose with this process.

A graphical component will be added to the VinSolutions Performance Dashboard so the Executive Team has visibility into how many cancellations are in process, what accounts were Saved versus Lost.

Responsibilities

Action	Assigned To	Due Date
Create Case	Accounting	Immediately upon customer notification to cancel
Task to Save Account	Regional	10 days from date created
Email Alert	Director of Sales/VP of Sales/National Account Dealer Advocate/Regional Team	
Task to Review Cancellation Process	Accounting	10 days from date created
Update the Account Alert	Accounting	Immediately
Update status of Account to Inactive	Accounting	When cancellation confirmed
Update the Account Lost Reason	Accounting	When cancellation confirmed
Update the Account Deactivation Date	Accounting	When cancellation confirmed
Update AccPac	Accounting	When cancellation confirmed
Task to Disable all MotoSnap Functionality <ul style="list-style-type: none">• Disable Exports/Third Parties• Close Open Cases in Development	National Account DA	When cancellation confirmed
Task to Disable any Web Functionality <ul style="list-style-type: none">• Website, SEO, SMM• Facebook• Twitter	Creative Director	When cancellation confirmed (Tasks triggered upon close of case)

Here is the link to the Case view for cancellations in process

[Cancellations in Process](#)

VinSolutions

Customer Cancellation Process

2/10/2011

