



# Retention SOP

This SOP will help ensure that all customer uninstallation requests are handled efficiently, with maximum effort made to retain customers before proceeding with the uninstallation process.

## ▼ Overview

The retention process focuses on handling customer uninstallation requests, identifying reasons for cancellations, and making efforts to retain customers. The SOP outlines the steps involved in managing these requests through the Freshdesk ticketing system and other channels.

## ▼ Channels Involved

- **Freshdesk Ticketing System:** Central system for managing tickets related to customer retention and uninstallation requests.
- **Email & Chat:** Used for direct communication with customers.
- **Outbound Calls:** Calls made by the retention team to engage with customers and address their concerns.

## ▼ Uninstallation Process (Normal Procedure)

- **Step 1:** Receive the uninstallation request through Freshdesk, Email, Chat, or an Outbound Call.
- **Step 2:** Log the uninstallation request with relevant details, including the customer's information, reason for uninstallation, and date of request.
- **Step 3:** Assign the ticket to the **Retention Team** for follow-up and customer engagement.

#### ▼ Retention Properties Updates

- **Step 1: L1 Retention Status - No Contact Established:**
  - If the team is unable to contact the customer, the status is marked as "Unable to connect."
  - The ticket is tagged as "No Contact Established" and assigned to the agent for further attempts.
  - Update the ticket with the attempt number (e.g., "No Contact Established 03").
- **Step 2: L1 Retention Status - Not Retained:**
  - If the customer does not agree to retain the service after contact, mark the status as "Not Retained."
  - The ticket is moved to the **Uninstallation Group**.
  - Update the installation date, city, uninstallation request source, pickup requested date and time, and reason for loss.
- **Step 3: L1 Retention Status - Retained:**
  - If the customer agrees to retain the service, update the status as "Retained."
  - Assign the ticket to the appropriate retention agent for follow-up.
  - Update the ticket with the **L2 Retention Status:**
    - **Resolve:** The issue was resolved during the follow-up.
    - **Follow Up:** Further follow-up is required to ensure customer satisfaction.

- **Assigned to Device Replacement:** If the issue requires a device replacement, assign the ticket accordingly.
- **Step 4:** Ensure all data fields are updated, including the reason for loss or customer retention details.

#### ▼ Uninstallation Reason Properties

- **L1 Status - Unable to Connect:** No contact has been established with the customer.
- **L1 Status - Not Retained:** The customer has confirmed they will not retain the service.
- **L1 Status - Retained:** The customer has agreed to retain the service after engagement.
- **L2 Status - Resolve/Follow Up/Assigned to Device Replacement:** Specific actions to be taken after retention contact.

#### ▼ Final Steps

- If the customer agrees to retain, ensure proper follow-up and resolution of the issue.
- If the customer decides to uninstall, update the system with all the necessary details regarding the uninstallation request and assign it to the **Uninstallation Group** for further processing.
- Regularly monitor the Freshdesk system to ensure all tickets are properly assigned and handled within the required time frame.

#### ▼ Key Responsibilities

- **Retention Team:** Engage with customers and attempt to resolve their issues, encouraging them to retain the service.
- **Uninstallation Group:** Handle the uninstallation requests and process them once retention efforts have been exhausted.
- **Agent:** Responsible for updating ticket details, contacting customers, and following up on retention efforts.

#### ▼ Reporting

- Retention agents are responsible for updating the Freshdesk system with all relevant details of each ticket.
- Weekly and monthly reports should be generated to track the retention success rate and reasons for uninstallation.