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Olenis S&S Recovery Kit

Purpose: Recover failed subscription renewals via outbound call, voicemail, email, and SMS. Capture product feedback regardless of call outcome.

Owner: CS Team **Last Updated:** 2026-05-12 **Status:** Ready to deploy, A/B testing required for openers

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1. Phone Script

Section 1: Open + Identity Confirm

Agent: "Hi, is this [Customer Name]?"

Customer: "Yes, this is she/he."

Then pick ONE opener variant per agent shift (rotate weekly for clean A/B data):

Variant A: The Shipment Pause

"Hey [Name], it's [Customer Name] from Olenis. Quick one, I'm calling because your [Product Name] shipment was supposed to go out [today/tomorrow] and it got held up on our end. Wanted to catch you before it sat in the warehouse another day. Got 60 seconds?"

Best for: Customers within 0-3 days of their renewal date. Highest urgency.

Variant B: The Locked Rate

"Hey [Name], [Your Name] from Olenis. I'm calling because your subscriber rate of \$[X] is about to roll over and I noticed something on the renewal that's going to bump you off that price if we don't fix it in the next day or two. Can I walk you through it real quick?"

Best for: Long-tenured subscribers (3+ months) who'd feel the loss of their locked-in rate.

Variant C: The Specific Detail

"Hey [Name], [Your Name] over at Olenis. I'm looking at your account right now, you've got [Product Name] on auto-refill, last shipped [date]. I caught something on your next order I want to flag before it ships. Two minutes, that work?"

Best for: Cold or skeptical customer profiles. Specificity kills robo-call suspicion fast.

Universal Fallback (if customer says they're busy)

"No problem at all. Is it better if I call back in an hour, or would you like me to text you a secure link so you can handle it whenever you have 30 seconds?"

Section 2: Value Anchor (do NOT skip)

Agent: "So first, thanks for being a subscriber, really appreciate you. The reason I'm reaching out today is I wanted to catch you before your next [Product Name] shipment went out the door."

Section 3: Soft Reveal of the Decline

Agent: "Here's what happened. Our system flagged your card on file and the renewal bounced. Looks like [your card on file just hit its expiration date / your bank flagged the auto-renewal,

which they do sometimes / the charge didn't go through this cycle]. Were you aware of that, or is this the first you're hearing of it?"

Listen. Let them talk. Don't rush.

Language rule: Never say "insufficient funds," "declined," or "rejected." Always frame as a system/bank issue, never a customer fault.

Section 4: Bridge to the Close (Frame as Rescuing Them)

Agent: "Totally common, happens all the time, especially with auto-renewals. The warehouse paused your order so it didn't ship without a working payment, but I can fix that on my end in about two minutes and get your [Product](#) released today so you don't break your routine. Your subscriber price is still locked in at \$[X], which is \$[Y] less than the one-off price, and I'd hate for you to lose that."

Section 5: The Direct Close (Priority Path)

Agent: "I have your account open right here. Want to use the same card ending in [last 4], just with the updated expiration? Or is there a different card you'd like to put on file?"

Best case: they give you the card. Process it, jump to Section 8 (Feedback Close).

Section 6: First Objection Rebuttal

If customer says: "I'm not comfortable giving card info over the phone."

Agent: "Totally fair, a lot of folks feel that way. Just so you know, I'm not actually seeing the full number, it goes straight into our secure terminal. But if you'd rather not, I can text or email you a secure link right now while we're still on the line. Takes about 30 seconds. Want me to send that to the number ending in [XXXX] or to your email on file?"

Stay on the line while they click. Walk them through it. Do NOT hang up until you see the update confirmation.

Section 7: Save Tiers (if customer wants to cancel)

Always start with the diagnostic question first. It tells you which tier to lead with: > "Got it. Before we cancel, can I ask, is it the product not working for you, or is it more of a timing/budget thing?"

- **If product issue** → lead with Tier 1 (Swap)

- **If timing or budget** → lead with Tier 2 (Pause)
- If they refuse the first offer, escalate to the next tier in order

Tier 1: The Swap

"Totally fair, [Product Name] doesn't work for everyone. But we have a bunch of other products that target different things. What were you hoping it would help with most? I can probably swap you to something better suited at the same subscriber rate, no extra cost."

Listen for their goal (e.g., "I just wanted brighter skin," "less puffiness," "smoother fine lines"). Scan Section 5 Product Cheat Sheet "What It Does" column for 2-3 matches.

"Got it, that's what [Other Product Name] is built for. A lot of customers love it for exactly that. Want me to swap your subscription over right now? Same subscriber rate, ships on your next refill date."

If yes: process the swap in Loop, confirm next ship date, jump to Section 8 (Feedback Close).

Tier 2: The Pause

"What if I just skipped this month for you? No charge today, your next shipment would land in [60 days] and your subscriber pricing stays locked in. Want me to do that?"

Tier 3: The Discount

If they still want out: "I hear you. Let me see what I can do. I can knock 20% off this next refill if you'd like to give it one more cycle. That brings it down to \$[X]. Worth one more shot?"

Tier 4: The Clean Cancel

If still no: "Totally understand, no hard feelings. Before I close it out, what was the main reason? That genuinely helps us. Okay, I'll get that cancelled for you, and you'll get a confirmation email in the next few minutes. You're always welcome back."

Log the cancel reason. This is the most valuable data on the call.

Section 8: Universal Feedback Close (RUNS ON EVERY CALL)

The agent always runs this block before sign-off, no matter the outcome.

Lead-ins by outcome:

After Phone Recovery Success (Section 5): > "Awesome, you're all set. Before I let you go, one quick thing..."

After Portal Link Pivot (Section 6): > "Perfect, the link's on the way. While you've got me, one quick thing..."

After Save Tier 1 (Swap): > "Awesome, I just swapped you over to [Other Product Name]. Your next shipment will be that one at the same subscriber rate. Before I let you go, one quick thing..."

After Save Tier 2 (Pause): > "Done, your next shipment is pushed to [date]. One quick thing before I let you go..."

After Save Tier 3 (Discount): > "Got it, that 20% will apply to your next refill automatically. Before I let you go, one quick thing..."

After Save Tier 4 (Clean Cancel), lead-in is different: > "Alright [Name], your subscription is officially cancelled and you'll get a confirmation email in the next few minutes. No more charges, you're all clear. One last thing though, and this isn't a save attempt, I promise. You've been with us [X months] so you've used [Product Name] longer than honestly most of our team has. I'd really love to know how it was for you and if there's anything we should be doing better. Whatever you say goes straight to our product team, not back into a save script."

Key phrase: "this isn't a save attempt, I promise." Disarms them. You'll get 10x more honest answers than any exit survey.

Core Ask (same for all outcomes)

"You've been with us [X months] and honestly used [Product Name] more than most people on our actual team. How have you been liking it? And if there's anything you'd want us to tweak or build better, I'd love to write it down and send it straight to our product team. We actually use this stuff."

Responses

Positive: > "That's amazing to hear. I'll pass that along, stuff like that genuinely lands on our team's desk."

Concern or improvement idea: > "Really appreciate you telling me. I'm logging it under your account so our team sees it came from a real long-term customer, not just a survey. Mind if I follow up if they have any questions?"

Cancel-specific negative ("it didn't work for me"): > "Hey, totally fair. Can I ask one follow-up, just for our notes? Was it something specific like [texture / scent / results / packaging / price] or more of a general 'didn't see what I was hoping for' feeling? You don't owe me an answer, I just want to make sure it gets categorized right when it goes to the team."

This is the goldmine. Don't try to save them here. Just listen and log.

Section 9: Sign-Offs

Recovery success: > "Thanks for sticking with us, [Name]. Take care."

Saved with skip or discount: > "Glad we figured it out, [Name]. Talk soon."

Cancel: > "Really appreciate you giving it a real shot and being honest with me. You're always welcome back. Take care, [Name]."

Portal link sent (still pending): > "Perfect. Once you tap the link and update your card, the order releases automatically. I'm leaving a note on your account so my team knows it's handled. Sound good?"

2. Voicemail Script

Length target: 20-25 seconds. Anything longer gets skipped.

Voicemail v1: The Shipment Pause (matches Variant A) > "Hi [Name], this is [Your Name] from Olenis, the [Product Name] team. I'm calling because your next refill was supposed to ship and we hit a small snag on our end. I want to make sure it goes out without delay. I'm going to text you a secure link in the next minute so you can fix it in 30 seconds whenever you have a moment. If you'd rather chat, call me back at [number]. Thanks [Name], talk soon."

Voicemail v2: The Friendly Heads-Up > "Hey [Name], it's [Your Name] over at Olenis. Quick heads-up about your next [Product Name] order, nothing major, just need to confirm something on your end so it ships on time. I'll send you a secure text link right after this. Takes about 30 seconds. Or call me back at [number] if that's easier. Thanks [Name]."

Rule: Always follow voicemail with the SMS in section 4 within 2 minutes. Voicemail + immediate SMS recovery rate is ~3x voicemail alone.

3. Email Recovery Cadence

Three emails, triggered automatically when card fails. Stop all emails if customer recovers via any channel.

Callback number used throughout: 1(888) 910-8214 **Sign-off used throughout:** "Stay glowing, Olenis Customer Care"

Email Day 1 (sent within 1 hour of failed charge)

Subject lines (rotate to test): - "Action Required: Your [Product Name] refill is on hold" - "Your [Product Name] is paused (quick fix inside)" - "[Name], we held your order"

Body:

Hi [Customer Name],

We tried to get your latest Olenis fresh batch ready for shipment, but we hit a small hiccup with the payment on file.

The reason: [Insert Reason: card expired / bank-side decline / charge didn't go through this cycle].

Because we don't want you missing a single day of your [Product Name] routine, we put your shipment on a temporary hold instead of cancelling it. Your subscriber rate of \$[X] stays locked in while we sort this out.

Two ways to fix it in under a minute:

Visit your Self Help Portal here to update your card: [Self Help Portal Link]

Or call us directly at **1(888) 910-8214**. One of our skin experts can securely update your info and prioritize your order for today's outgoing warehouse batch. Phone is faster if you're running low.

Stay glowing, Olenis Customer Care

Email Day 3 (if no action)

Subject lines: - "Still holding your [Product Name] refill" - "[Name], your subscriber rate expires in 4 days" - "Consistency is the secret, let's get you back on track"

Body:

Hi [Customer Name],

Just checking back in. Your [Product Name] refill is still sitting on our "Ready to Ship" shelf, but we're still seeing that payment issue ([Insert Reason]).

Consistency is the secret to great skin, and we'd hate for a billing glitch to get in the way of your results. Your subscriber rate of \$[X] is also locked in for the next 4 days, after that it rolls back to the regular rate of \$[Y].

Visit your Self Help Portal here: [Self Help Portal Link]

From your portal you can: - Update your card to keep your subscription going - Pause for a month (no charge today, ships in 60 days, your subscriber price stays locked) - Adjust your shipment frequency if you have too much product on hand

Or call us at **1(888) 910-8214** if you'd like to swap to a different product that might suit your skin better, or just want one of our skin experts to handle it for you.

If we don't hear from you in the next few days, your subscription may auto-cancel to avoid further failed charges. Let's get that routine back on track.

Stay glowing, Olenis Customer Care

Email Day 7 (last touch)

Subject lines: - "Closing your subscription tomorrow unless..." - "[Name], last call on your [Product Name] refill" - "Should we cancel or keep going?"

Body:

Hi [Customer Name],

This is the last email we'll send on this. If we don't hear from you in the next 24 hours, your Olenis subscription will auto-cancel so you stop getting these reminders.

Visit your Self Help Portal here: [Self Help Portal Link]

From your portal you can: - Update your card to keep your routine going - Pause your subscription for a month - Cancel your subscription

If you'd rather not use the portal: - Reply to this email with "cancel" and one of our skin experts will handle it personally, no friction - Or call us at **1(888) 910-8214** to talk it through. If the product wasn't quite right, we can also swap you to a different one that might fit better.

Whichever way you go, thanks for giving [Product Name] a real shot. If there's anything we could have done better, we'd genuinely love to hear it. Replies come straight to our customer care team.

Stay glowing, Olenis Customer Care

Self Help Portal Email (TRANSACTIONAL)

Trigger: Sent immediately when a phone agent promises a secure link mid-call (Section 6 of phone script). NOT part of the recovery cadence.

Subject: Link to update your Olenis account

Body:

Hi [Customer Name],

As promised, here's the direct link to your Self Help Portal:

[Self Help Portal Link]

From your portal you can update your card, pause your shipment, or make any other changes to your subscription.

A quick note on timing: Once you update your details online, our system typically takes about 24 hours to re-process the shipment.

If you're running low and need your [Product Name] shipped out immediately, you can still give us a quick call at **1(888) 910-8214**, and one of our skin experts can manually prioritize your order for today's warehouse batch.

Otherwise, you're all set to go through the link above.

Stay glowing, Olenis Customer Care

Why this email matters: The 24-hour delay note is the single best tool we have to pull customers back to phone (which has the highest recovery rate). Do not remove it.

4. SMS Templates

Rule: SMS sent within 2 minutes of voicemail. Keep under 160 characters when possible.

SMS v1: Post-Voicemail Recovery (immediately after voicemail) > Hey [Name], [Agent Name] from Olenis here. Just left you a voicemail about your next [Product](#) order. Your portal: [Self Help Portal Link]. Takes 30 sec. Reply STOP to opt out.

SMS v2: Day 2 Follow-up (if no card update from email day 1) > Hi [Name], your [Product](#) refill is still on hold. Update your card in your portal: [Self Help Portal Link]. Or reply PAUSE to skip this month. - [Agent Name], Olenis

SMS v3: Final SMS Before Cancel (Day 7) > [Name], last reminder: your Olenis subscription auto-cancels tomorrow unless we hear back. Your portal: [Self Help Portal Link]. Pause: reply PAUSE. Cancel: reply CANCEL. Thanks for trying us.

5. Product Cheat Sheet

Quick reference for agents during recovery calls. Use this to confirm what product the customer is on, quote pricing, and **offer product swaps as a recovery option** if the current product isn't working for them.

Subscription-Eligible Products

All prices below assume **monthly subscription = 20% off retail**. Quarterly = 25% off.

Product (say it like this)	What It Does	Retail	Subscriber Price
Snail Glow Eye Patches	Brightens dark circles, depuffs morning eyes	\$24.99	\$19.99
Collagen Face Mask	Firms skin, plumps fine lines	\$22.99	\$18.39
Peptide Neck Patches	Smooths neck lines, tightens skin	\$29.99	\$23.99
Dark Spot Serum	Fades hyperpigmentation and sun spots	\$34.99	\$27.99
Retinol Eye Cream	Softens fine lines, anti-aging	\$32.99	\$26.39
Vitamin C Glow Serum	Brightens dull skin, evens tone	\$29.99	\$23.99
Hyaluronic Lip Mask	Hydrates and plumps lips overnight	\$19.99	\$15.99
Snail Mucin Moisturizer	Deep hydration, repairs skin barrier	\$34.99	\$27.99
Korean Sunscreen Stick	Daily SPF, no white cast	\$27.99	\$22.39
Green Tea Clay Mask	Detoxes pores, controls oil	\$24.99	\$19.99
Caffeine Eye Stick	Depuffs and reduces dark circles	\$22.99	\$18.39
Niacinamide Pore Serum	Minimizes pores, balances oil	\$29.99	\$23.99
Calcium Stick	Strengthens skin barrier, firms	\$39.99	\$31.99

Product Swap as a Recovery Option

This is the first save move when the issue is the product itself, before offering pause or discount.

If a customer says the current product isn't working for them, agents can swap their subscription to **any** of the products above at the same subscriber rate. Swapping preserves the subscription, the margin, and the relationship.

How to use this table during a swap save:

1. Ask what they were hoping the current product would do (e.g., “less puffiness,” “fewer fine lines,” “clearer skin,” “more hydration”)
2. Scan the “What It Does” column for 2-3 products that match the goal
3. Offer the swap at the same subscriber rate, no extra cost
4. If they say yes, process the change in Loop and confirm the next ship date

See Phone Script Section 7, Tier 1 for the full swap script.

Pronunciation Cheat Sheet

For the tricky ones. Mispronouncing on a call kills trust instantly.

Product Word	Say It Like	Common Mistake
Niacinamide	“nye-uh-SIN-uh-mide”	Don’t say “neye-a-CIN-a-mide”
Hyaluronic	“hi-uh-LURE-on-ick”	Don’t say “hya-LOO-ron-ick”
Mucin (snail mucin)	“MEW-sin”	Don’t say “moo-SEEN” or “moo-SAN”
Retinol	“RET-in-all”	Don’t say “RE-tin-ol” with a long E
Peptide	“PEP-tide”	Easy, just don’t say “pep-TEED”
Collagen	“COLL-uh-jen”	Don’t say “co-LAY-jen”

Decline Reason Cheat Sheet (Loop Codes → Agent Script)

Data source: Loop billing attempts, 100 most recent (May 2026 snapshot). Refresh quarterly.

Train new hires on the **top 3 codes first** (they account for 59% of all declines).

Rank	Loop Decline Code	% of Declines	What Customer Sees	What Agent Says	Recoverability	Recovery Path
1	INSUFFICIENT_FUNDS	21%	“Your card has insufficient funds”	“The charge didn’t go through	Medium	Offer Pause for a month first (Phone Script Section 7, Tier 2), retry next cycle. If they want

Rank	Loop Decline Code	% of Declines	What Customer Sees	What Agent Says	Recoverability	Recovery Path
				this cycle"		to keep going, ask for a different card.
2	INVALID_PURCHASE_TYPE	19%	"Your card does not support this type of purchase"	"Your bank doesn't allow recurring charges on that card type. Want to put a different one on file?"	High	Need a NEW card. Cannot retry the same card. Often prepaid/gift/HSA.
3	RETRY_DECLINED	19%	Generic decline	"Our processor kept getting bounced back, want to put a fresh card on file?"	Medium	Need new card or customer needs to call bank first.
4	DO_NOT_HONOR	7%	Bank-level block	"Your bank flagged the auto-renewal, which they do sometimes"	High	Customer can call bank OR update card.

Rank	Loop Decline Code	% of Declines	What Customer Sees	What Agent Says	Recoverability	Recovery Path
5	PAYMENT_METHOD_NOT_FOUND	6%	"Payment method was revoked"	"Looks like the card on file was changed or removed. Want to add a new one?"	High	Need new card.
6	MERCHANT_ACCOUNT_ERROR	6%	Our side issue	"We had a hiccup on our side, let me retry that for you"	Very High	Just retry. Often works immediately.
7	FRAUD_SUSPECTED	6%	Bank flagged as fraud	"Your bank flagged it as a possible fraud charge"	Medium	Customer needs to call bank first before any retry. Don't push.
8	INVALID_PAYMENT_METHOD	6%	"Invalid account"	"The card on file isn't reading on our end, want to put a new one on file?"	High	Need new card.
9	CARD_DECLINED	4%	"Your card was declined"	"Your bank flagged the	High	Update card or customer calls bank.

Rank	Loop Decline Code	% of Declines	What Customer Sees	What Agent Says	Recoverability	Recovery Path
				auto-renewal"		
10	EXPIRED_CARD	3%	"Card has expired"	"Your card on file just hit its expiration date"	Very High	Easiest fix. Update card.
11	TRANSACTION_LIMIT_EXCEEDED	1%	Bank limit	"Looks like you hit your daily limit on that card"	Medium	Try different card or wait 24h.
12	INCORRECT_NUMBER	1%	Number wrong	"There's a typo on the card number on file"	High	Correct typo, retry.

Training Priority (For New Agent Onboarding)

Memorize these three first (cover 59% of all calls): 1. INSUFFICIENT_FUNDS → lead with Pause offer 2. INVALID_PURCHASE_TYPE → need new card, do not retry same one 3. RETRY_DECLINED → likely need new card

Group 2 (cover another 25%): 4. DO_NOT_HONOR, PAYMENT_METHOD_NOT_FOUND, MERCHANT_ACCOUNT_ERROR, FRAUD_SUSPECTED, INVALID_PAYMENT_METHOD

Edge cases (memorize after 30 days): 9-12. CARD_DECLINED, EXPIRED_CARD, TRANSACTION_LIMIT_EXCEEDED, INCORRECT_NUMBER

Hard Rules

1. **FRAUD_SUSPECTED is not a recovery call.** Tell the customer to call their bank, then end the call politely. Do NOT push for a card update. Pressuring on a fraud flag damages the brand and may violate processor rules.
 2. **INVALID_PURCHASE_TYPE means same-card retry is impossible.** Never tell the customer “let me try that again with your existing card.” It will fail again. Always ask for a different card.
 3. **MERCHANT_ACCOUNT_ERROR is OUR fault, not theirs.** Apologize, retry on the call, and never blame the customer or their bank.
-

Investigation Flag for Leadership

 **INVALID_PURCHASE_TYPE at 19% of declines is unusually high.**

Industry baseline for this code is typically 3-5%. At 19%, we’re either: - Accepting card types at checkout that the rebill processor rejects (prepaid, gift, HSA/FSA cards) - Running a config mismatch between Shopify Payments at initial purchase and the rebill processor - Missing a card-type validation at the subscription signup step

Recommended action: Loop in John (CTO) to audit the gap between initial-purchase card validation and rebill-time card validation. If we tighten the funnel at checkout, we could recover ~19% of current declines without any agent intervention.

Note on aggregate Loop billing health (75% failure rate): That number is inflated. Loop counts each retry as a separate failed attempt, so one customer with a failed card generates 4-5 “failures” in the data. True customer-level failure rate is closer to 20-25%. Don’t panic-share the 75% number externally.

6. Placeholder Swap Guide

Every bracketed [Placeholder] in this kit needs to be filled in before the call (or live during it). This section is the master list so a new agent knows exactly where to find each value and what NOT to do.

Master Placeholder Table

Customer + Agent

Placeholder	What to Fill In	Where to Find It	Example
[Customer Name] / [Name] / [First Name]	Customer's first name only	Shopify customer record	"Sarah"
[Your Name] / [Agent Name]	Your first name	You	"Jamie"
[last 4] / [XXXX]	Last 4 digits of card on file	Loop subscription record	"4242"

Product

Placeholder	What to Fill In	Where to Find It	Example
[Product Name]	Customer-facing product name (NOT the SKU slug)	Loop subscription details, then map to Section 5 cheat sheet	"Snail Glow Eye Patches" (NOT "snail-glow-eye-patches")

Pricing

Placeholder	What to Fill In	Where to Find It	Example
[\$X]	Subscriber price (with 20% discount)	Section 5 Product Cheat Sheet	"\$19.99"
[\$Y]	Regular retail price	Section 5 Product Cheat Sheet	"\$24.99"
[\$Z]	Difference between regular and subscriber	Calculate: Y minus X	"\$5"

Dates + Timing

Placeholder	What to Fill In	Where to Find It	Example
[X months]	Customer's tenure	Loop subscription start date	"5 months"
[today/tomorrow]	When next shipment is scheduled	Loop next-ship date	"today" or "tomorrow"
[date]	Last ship date or next ship date	Loop subscription record	"March 14"
[X days]	Days until next refill	Loop next-ship date	"30 days"
[60 days]	Standard pause duration	Default value (1 month skip from last ship)	"60 days"

Decline Reason

Placeholder	What to Fill In	Where to Find It
[Insert Reason]	One of the three approved phrasings below	Loop or Shopify failed-charge log

Approved phrasings (pick ONE based on decline code): - Expired card → "your card on file just hit its expiration date" - Bank decline → "your bank flagged the auto-renewal, which they do sometimes" - NSF / insufficient funds → "the charge didn't go through this cycle"

Never say: "insufficient funds," "declined," "rejected," "failed payment," or "past due."

Channel + Contact

Placeholder	What to Fill In	Where to Find It
[Self Help Portal Link]	Customer-specific Self Help Portal URL (one link per customer; covers card update, pause, cancel, frequency change)	Auto-generated by Loop per customer; Klaviyo merges into emails/SMS via merge tag

Placeholder	What to Fill In	Where to Find It
[phone/email]	Channel customer wants the portal link sent to	Ask customer mid-call
[number]	Olenis callback number	Always 1(888) 910-8214

Important: The Self Help Portal is **one customer-specific link**, not separate buttons for “Update Card” or “Pause.” Once the customer is inside the portal, they can update their card, pause shipments, change frequency, or cancel, all from there. Never reference “the update card button” or “the pause button” in agent-written copy because those buttons don’t exist as separate links agents can send.

Where Each Placeholder Appears (Section Map)

Use this as a checklist when prepping for a call.

Section	Placeholders Used
Section 1 (Opener variants)	[Customer Name], [Your Name], [Product Name], [today/tomorrow], \$[X], [date]
Section 2 (Value Anchor)	[Product Name]
Section 3 (Decline Reveal)	[Insert Reason]
Section 4 (Bridge to Close)	[Product Name], \$[X], \$[Y]
Section 5 (Direct Close)	[last 4]
Section 6 (Objection Rebuttal)	[XXXX] (phone/email last 4)
Section 7 Tier 1 (Swap)	[Product Name], [Other Product Name]
Section 7 Tier 2 (Pause)	[60 days]
Section 7 Tier 3 (Discount)	\$(X)
Section 7 Tier 4 (Cancel)	[Name], [X months], [Product Name]

Section	Placeholders Used
Section 8 (Feedback Close)	[Name], [X months], [Product Name], [date]
Section 9 (Sign-offs)	[Name], [Product Name], [X days]
Voicemails	[Name], [Your Name], [Product Name], [number]
Emails	[Customer Name], [Product Name], [Insert Reason], \$[X], \$[Y], [Self Help Portal Link]
SMS	[Name], [Agent Name], [Product], [Self Help Portal Link]

Pre-Call Worksheet (Fill This In Before You Dial)

Copy this into a note app or on paper before every call. Fills in all placeholders in 30 seconds.

CUSTOMER + ACCOUNT

- Customer first name: _____
- Tenure (months): _____
- Last 4 of card: _____
- Decline reason (pick one): ☐ expired ☐ bank flag ☐ didn't go through

PRODUCT (from Section 5 cheat sheet)

- Product name: _____
- Subscriber price (\$X): \$_____
- Regular price (\$Y): \$_____
- Difference (\$Z = Y - X): \$_____

SHIPMENT

- Was scheduled for: ☐ today ☐ tomorrow ☐ specific date: _____
- Next ship date: _____
- Days until next refill: _____

AGENT

- Your name: _____
-

Common Mistakes (Train New Hires On These)

Mistake	Why It Hurts	Do This Instead
Reading brackets out loud (“your bracket product name end bracket”)	Sounds robotic, instantly kills trust	Read brackets silently, fill in real word
Filling [Product Name] with the SKU slug (“snail-glow-eye-patches”)	Sounds like a database, not a brand	Use Section 5 customer-facing name (“Snail Glow Eye Patches”)
Saying “\$24.99 dollars”	Redundant + reads like a robocall script	Say “twenty four ninety-nine”
Saying “subscribed” to a quarterly customer	Wrong frame, confuses them	Say “your refill”
Forgetting [X months] lookup and saying “you’ve been with us for a while”	Vague, loses the value anchor	Either look it up OR use Section 8’s tenure-free variant
Saying “insufficient funds” instead of an approved phrasing	Embarrasses customer, kills the call	Use one of the three approved decline phrasings

When You Can’t Find a Value Fast

If the system is slow or you can’t find a placeholder in time:

Missing Value	Safe Improv
[Product Name]	“Just to make sure I’m looking at the right thing, what’s the product you’ve been getting from us?”
[X months]	“You’ve been a subscriber for a while” (only as last resort)
[date]	Skip the date specificity, just say “your next refill”

Missing Value	Safe Improv
[last 4]	"The card we have on file" (let them volunteer)
[Insert Reason]	"There was an issue on the payment side" (most generic safe fallback)

Never stall the call to dig for a placeholder for more than 10 seconds. Move on.

7. Agent Quick Reference

Branch Map

All "Section" references below point to subsections inside the Phone Script (Section 1 of this kit), not the top-level kit sections.

If Customer Says...	Go To
"Yes, update my card"	Phone Script Section 5 (Direct Close)
"Not over the phone"	Phone Script Section 6 (Portal pivot)
"I'm too busy"	Phone Script Section 1 fallback / SMS link
"I want to cancel"	Phone Script Section 7 (Save tiers, start with diagnostic)
"I didn't know it declined"	Phone Script Section 4 (Lean into rescue framing)
"The product isn't working for me"	Phone Script Section 7, Tier 1 (Swap)
"Just skip this month"	Phone Script Section 7, Tier 2 (Pause)
[Any outcome reached]	Phone Script Section 8 (Feedback Close)

Language Rules

Always say: - "Card on file expired" - "Bank flagged the auto-renewal" - "Charge didn't go through this cycle" - "Held your order so it didn't ship" - "Subscriber rate locked in"

Never say: - "Insufficient funds" - "Declined" - "Rejected" - "Failed payment" - "Past due"

Hold-Time Rules

- Never put a customer on hold for more than 30 seconds without checking in
- If you need to look something up, narrate it: "Let me pull that up real quick, give me 10 seconds"
- Silence kills calls faster than bad news

Bonus Structure Note

For Section 8 (Feedback Close) to actually happen on cancel calls, agent bonus cannot be tied to retention rate alone. Add a "feedback-logged-per-call" metric (target: 80%+) so agents have an incentive to run the feedback close even when the save fails.

Appendix A: A/B Test Protocol

Setup: - 3 opener variants (A, B, C) - Each agent uses ONE variant per shift, rotated weekly - Minimum 50 calls per variant before declaring a winner - 2-week minimum test window

Win metric: Phone-recovery rate (Column K = "Phone-Recovered") **Secondary metric:** Combined recovery rate (Phone + Portal) **Tiebreaker:** Drop-off rate before Section 3 (lower is better)

After winner emerges: - Default all agents to winner - Run new challenger variant monthly against winner - Retire variants that lose two rounds in a row

Appendix B: Operational Setup Checklist

- ☐ Tracking sheet created in Google Sheets, shared with CS team
- ☐ Secure card-update portal link tested end-to-end
- ☐ SMS templates approved for compliance (opt-out language)
- ☐ Email templates loaded into Klaviyo with proper triggers
- ☐ #cs-product-feedback Slack channel created for feedback routing
- ☐ Agent bonus structure updated to include feedback-logged metric
- ☐ Variant rotation schedule posted in agent workspace
- ☐ First weekly review meeting scheduled for [start date + 7 days]

8. Tracking Sheet Template

Paste these column headers into Google Sheets. One row per call.

Column	Field	Notes
A	Date	YYYY-MM-DD
B	Agent	Name or ID
C	Customer Name	First name only OK
D	Customer ID	Shopify or Loop ID
E	Tenure (months)	From subscription start
F	Variant Used	A / B / C
G	Connected?	Y / N (live human picked up)
H	Voicemail Left?	Y / N
I	Dropped Before Section 3?	Y / N (measures opener stickiness)
J	Reached Direct Close (Section 5)?	Y / N
K	Outcome	Phone-Recovered / Portal-Recovered / Saved-Swap / Saved-Pause / Saved-Discount / Cancelled / No-Answer / Callback-Scheduled
L	Save Tier Used	None / 1 (Swap) / 2 (Pause) / 3 (Discount) / 4 (Cancel)
M	Cancel Reason (if cancelled)	Free text

Column	Field	Notes
N	Product Feedback Logged?	Y / N
O	Feedback Quote	Free text, paste customer's actual words
P	Feedback Category	Texture / Scent / Results / Packaging / Price / Other
Q	Follow-up Needed?	Y / N
R	Notes	Agent free text

Weekly reporting cuts: - Recovery rate by variant (Column F + K) - Drop-off rate by variant (Column F + I) - Top 5 cancel reasons (Column M) - Feedback themes by category (Column P) - Save tier conversion rate (Column L + K)

Target benchmarks (set after 2 weeks of data): - Phone-recovery rate: aim 25-35% of connected calls - Portal-recovery rate (post-call): aim 15-20% additional - Combined recovery: aim 40-55% of connected calls - Feedback capture rate: 80%+ of completed calls (regardless of outcome)

Questions or tweaks: Reply in workspace or message Isa directly.