



Best Practices for Saving Members

How does “precancel” work?

When a membership cancels due to a payment failure, they are put into a “precancel” status. They remain in pre-cancel for 45 days, and if payment is not received, they then cancel. This gives an associate a 45-day window to contact their member, help them provide a new payment method and stay active. The earlier in that 45-day process a member is contacted, the better chance you have to save your member.

Let member know they are in precancel.

- Are you aware that your membership is in precancel?
- Most of the time it is because a credit card was replaced, and new payment was not provided.
- Offer to help. 3-way call them into Member Services to assist them. Help them change their payment method on their mobile app.

Script

Mary, I wanted to give you a quick call because I noticed your LegalShield membership was in precancel today. Usually this is because you got a new credit card and haven't given the new payment yet. I want to make sure your covered, especially now. Do you have 3 minutes for me to help you get a new payment on file?

Reason One: Financial

If they are aware that it happened and are having a financial issue. Show empathy, but also remind them of areas that LegalShield could help with right now.

Job loss or debt:

- A Provider Attorney may be able to help you negotiate a lower credit card payment or interest rate which can save you money in the long run.
- A Provider Attorney may be able to help you with unemployment questions or other issues you are facing.

LegalShield can offer additional solutions:

- LegalShield can change a draft date so that their payment won't be due until after their next paycheck.
- LegalShield can downgrade their account so that they can keep some of their valuable benefits.

Reason Two: I haven't used it.

Remind your member, it's an investment:

- You have been a member with us for XX years, which means you have accrued over XX attorney hours. I would hate to see you lose all those hours.



Ask if they have downloaded the app (encourage usage):

- Download the LegalShield mobile app from Google Play or the App Store.
- Use the “Prepare Your Will” feature to complete a Will questionnaire and send it directly to your law firm to be prepared at no additional cost! Do this for free before your membership cancels!
- Check out the free Legal Forms available on the mobile app.
- Experience a law firm in the palm of your hand with the ability to call your law firm directly from the mobile app whenever you need them.
- 24/7 Emergency Access – When you need us, LegalShield will be there!
- Snap! A speeding ticket! Take a picture of your speeding ticket and send it directly to your law firm in the mobile app.

Reason Three: Member says they had a bad experience

- Find out what happened, listen to the member.
- Understand if it was a matter of not liking the outcome? If this is the case, help the member understand that having access to justice is important, even if we don't like the result or counsel.
- Find out if it was a matter of wrong expectations. Did the member understand the benefits, and misunderstand was covered 100% and what was covered under the preferred member discount? Help educate on the member on the benefits once again.
- If you feel it is warranted, you can file an Attorney Resolution form for your member. This will alert LegalShield to the issue and open a member resolution file. Help the member understand that both you and LegalShield care about their situation. To find this form, simply go to your Member App, click on “Ask Legal Questions” and type “Attorney Resolution.” The link to the form will be provided.

Final Steps:

- Assume the save!
- Take some time to review the benefits and remind them of the value of the service.
- Overcoming objections (words that work):
 - With everything going on right now, you need access to your legal rights!
 - Never know when you are going to need it! Give examples

Important information

Call Member Services at **866-966-2222** (available 24/7) and conference the member in to discuss/update their payment information. The representative will answer the line and ask for the membership number. **Please let the representative know you have a member on the line.** The member will be asked to provide their membership number, name, and to confirm their address, email, and phone numbers. Then the representative will assist to save the member!

For additional resources on how our services can help members during the Coronavirus pandemic, go to Prospect by LegalShield and access documents that you can share. These documents show how members can use their benefits RIGHT NOW!