



## RENEWALS PROCEDURE

Keep a list on your wall of the months of the year and which students are up for renewal each month, also add these individual dates to your calendar

### 4-6 WEEKS FROM RENEWAL DATE

- Call Student explaining that their renewal is coming up and you'd like to book in their 'Student Business Diagnostic Session' (SBDS)

This call will be a lot like a new sales session. You will use the diagnostic sheet but also really deep dive into where they are at.

### THE STUDENT BUSINESS DIAGNOSTIC SESSION

- Hold the SBDS call with the Student (use the SBDS sheet as guide), take notes
- Compare to original BDS scores (have this ready before call)
- Highlight areas of concern and original goals from SBDS results
- Where are they still struggling?
- What are their new goals?
- Tell them what program would be suitable for their renewal
- Provide options to achieve new goals
- Proceed with re-sign/upgrade / leaving steps

### RE-SIGN

- Get out a Student Re-sign/Upgrade Order Form Checklist
- Send new contract starting at the end of their current contract
- Send a new Ezidebit request for the new contract, this will make your future accounts management a lot easier! To do this you will need to use a unique 'Client Contract Reference'. Eg. for a student named Lisa Smith we use: LSMI SYN 20/21

I have a paper DDR form

My payer is with me

Email Payment Request

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**Payer Details**

Payer Identification

Client Contract Ref

Payer Type

First Name

Last Name

Payment Type

Contact Details

Email Address

Mobile Number

Residential Address

Address Line 1

Address Line 2



- Follow up if not received back within 30 mins
- Send a 'Thank you for re-signing' email
- Send Welcome Email
- Complete the Student Re-sign/Upgrade Order Form Checklist
- Update any trackers you have with new contract dates etc

### UPGRADE/DOWNGRADE

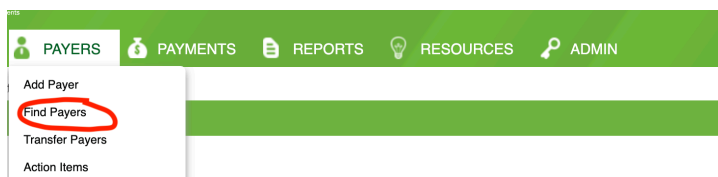
- Get out a Student Re-sign/Upgrade Order Form Checklist
- Send new contract starting at the end of their current contract
- Follow up if not received back within 30 mins
- Send a 'Thank you for re-signing' email if applicable  
(If Student was at the end of their contract and re-signing for an upgrade or downgrade not for mid-contract changes)
- Send Welcome Email
- Change program access or add into calendar for end of current contract  
(only change if mid-contract change otherwise change at end of current contract)
- Complete the Student Re-sign/Upgrade Order Form Checklist

### 1 WEEK FROM RENEWAL DATE – STUDENT LEAVING

- Email out '1 Week Out from Contract Expiry' email

### DAY OF CONTRACT EXPIRY –STUDENT LEAVING

- Email 'Student Last Day Email – Contract Completed in Full' or 'Student Last Day Email + Testimonial Request'
- Check that Ezidebit has successfully completed by comparing the total contract figure minus any deposit that wasn't taken through Ezidebit, against the 'Amount Cleared' total. This can be found by going to 'Payers' > 'Find Payers' > typing in the students name > clicking on their name





## Payment History

### PAYMENTS ?

[New Search](#)

Type	Date Processed	Scheduled Amount	Settlement Date	Amount Cleared	
DDB	28/07/2017	\$2,760.00	07/08/2017	\$2,760.00	Refund
DDB	21/07/2017	\$900.00	31/07/2017	\$900.00	Refund
DDB	14/07/2017	\$900.00	24/07/2017	\$900.00	Refund
DDB	07/07/2017	\$900.00	17/07/2017	\$900.00	Refund
DDB	28/06/2017	\$900.00	10/07/2017	\$900.00	Refund
Total Payments		\$12,860.00		\$12,860.00	

- Remove all access
- Remove from any calendars or trackers eg. Birthday tracker
- Add in any additional check in calls to calendar (eg. "I want to re-sign in 3 months")
- Add to ex-Student Birthday Card list (or calendar) for future Birthday cards