



Contract and Retention Checklist

NEW CONTRACT SIGNED	Y	N
Services Signed		
Debit Order and Declaration Signed		
Terms and Conditions Signed		
Relevant Addendums Signed		
Porting Addendums Signed (Where Applicable)		
RETENTION SIGNED		
Tariff and Offer Signed		
Terms and Conditions Signed		
Relevant Addendums Signed		
Porting Addendums Signed (Where Applicable)		
INDIVIDUAL DOCUMENTS SUBMITTED		
New Contracts – ID Copy		
Retentions – ID Copy or Drivers License		
Proof of Address / Postal		
Most Recent Payslip		
Most Recent Bank Statements		
COMPANY DOCUMENTS SUBMITTED		
All relevant ID's of Members		
Official Signed Company Order/ L-Head		
CK / Registration Documents		
3 Months' Bank Statements (if younger than 2yr)		
Proof Of Address		
Most Recent Processed Cheque		
Porting Addendums (Where Applicable)		
Donor SP Account (Porting if Applicable)		

I, the below signed Client; hereby declare that I have handed all the above required, relevant and selected Documentation to the Sales Representative identified below..

Client Signature

Representative Name



Complaints and Suggestions

As a valued client we would appreciate your feedback on our service.

Clients Name: _____

Tel. / Cell No: _____

E-Mail: _____

- | | POOR | FAIR | GOOD | EXCELLENT |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Friendliness | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Product Knowledge | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Willingness to help and enthusiasm | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Speed of efficiency and service | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Overall experience | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. How did you find out about us? _____ | | | | |

7. Tel. No of 3 referrals (1) _____

(2) _____ (3) _____

8. Accessories required

9. VAS required

Name of sales representative that helped you.

Comments:

Details: _____

Customer Care: (012) 996-1929 • **E-Mail:** customercare@autopage.biz

Sales Checklist

REGION:		STORE:	
DATE:		SALES AGENT:	
SUBSCRIBER:		MSISDN:	

NEEDS ASSESSMENT:

Highlight the choice of the three mobile Network Operators to the customer
Question the customer re his/her telephony spending history
Question the customer re his/her specific handset needs
Question the customer re his/her needs relating to connectivity
Question the customer re his/her needs relating to value added services
Question the customer re needs relating to his/her family or business
Recommend a tariff, handset, data card, modem and value added services based on the response received from the customer during the needs assessment

YES	NO

OUT OF BOX FAILURE POLICY:

Hand the customer a handset in a sealed box
Explain the OBF policy to the customer
Explain to the customer when a handset is not covered under the OBF policy
Explain the process the customer should follow in the instance of an OBF
Inform the customer that he/she should return the handset with the proof of payment within the 7 day period

YES	NO

HARDWARE WARRANTY:

Explain to the customer who holds the handset/data card/modem/laptop warranty and for how long (Refer to the welcome wallet)
Explain to the customer when the handset warranty will not be applicable (Refer to the welcome wallet)

YES	NO

REPAIRS

Explain to the customer when a handset will be repaired rather than exchanged for a new handset
Explain where a customer can bring a handset to be repaired
Explain to the customer who will be doing the repair of the handset
Explain the costs involved with repairs, both in warranty and out of warranty repairs
Explain when the customer can expect his/her handset back from the repair centre

YES	NO

TECHNOLOGY:

Inform the customer whether coverage would be sufficient for his/her needs
If customer wants an ADSL line, inform him/her re delays in installation (No specific time frames can be quoted for installation)

YES	NO

FIRST TIME BILLING:

Explain when the first payment will be due
Explain pro-rated amounts
Explain why the first time invoice is normally inflated
Explain that subscription is charged upfront
Explain calls or out of bundle data charges are charged in arrears

YES	NO

SUBSEQUENT PAYMENTS:

Explain when payments will be due after the first time payment
Explain when debit orders will be deducted off the bank account
Explain when direct deposits are due after receipt of the invoice
Explain that Autopage Cellular reserves the right to list customers on a National Credit Bureau in the event of non-payment
Explain that no lines will be reconnected if disconnection was due to non-payment and payment has not yet been received

YES	NO

ONGOING SUPPORT:

Communicate the office hours of the particular store to the customer
Highlight the National Call Centre's contact details and operating hours
Hand the customer a welcome wallet
Inform the customer that he/she may receive a welcome call/customer satisfaction interview from Altech Autopage Cellular

YES	NO

Customer Declaration:

I hereby declare that the Altech Autopage Cellular representative explained the aspects as indicated above.

Customer signature: _____

Sales consultant signature: _____