



**Order Form:**

Agency Name

Street Address

City

State

Zip

Agency Phone Number

Email Address

Agent's First Name

Agent's Last Name

Agent's Direct Number

Agent's Cell Phone

**RelEvent GUARANTEED Appointment Setting Service**

Guaranteed means if the appointment falls through we replace it, FREE.  
You select your own geographic area and the classes of business and we make the calls.

- \$269 +4 – Monthly Access to RelEvent plus 4 Guaranteed Appointments per month from us.
- \$269+2 - Monthly Access to RelEvent, plus 2 Guaranteed Appointments per month from us. (Appointments set with 10+ Employee Count)  
Additional Appointments - available providing your profile permits the increased calling activity.

**Special Projects**

Do you have a special need or project that you want to tackle? We can help. Give us the details and let us help you devise a custom solution. Pricing based on project details.

**Start Date** \_\_\_\_\_

**Appointment Setting Script** (Check One)

- ClearData's
- Email Your Script to: [bkossack@cleardataint.com](mailto:bkossack@cleardataint.com)

**Major Carriers Represented**

**Additional Info**

## How did you hear about us?

Advertisement       Colleague/Friend       Email       Internet

## Payment Method – Credit Card Only (Check One)

MasterCard       Visa       Discover       Amex

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Credit Card Number

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Expiration Date

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Zip code of card

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Print Name EXACTLY as it appears on card

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## Appointment Setting Services Guidelines

### System Selections

1. The agent must select at least 6 different classes of business in their profile
  - Contractors in any combination constitute 1 class of business
  - Restaurants in any combination constitute 1 class of business
  - Retail stores in any combination constitute 1 class of business
2. ClearData recommends setting the profile so that at least 350 prospects are available in the Main View of RelEvent
3. Prior to the start of the ClearData service, it is the responsibility of the agent to review the contents of the Main View of RelEvent to assure their profile is delivering the desired number and classes of prospects

### Special Requests

ClearData defines special requests as parameters set by the agent that limit the population of the prospect pool. Some examples are the specific limitations placed on employee size, mod or merit rating, specific zip codes within cities, business restrictions within class codes and others. While ClearData will make every effort to deliver within the limitations of these special requests, ClearData reserves the option to remove the limiting parameters at any time. Please note that special request parameters are not considered when determining if an appointment is eligible for replacement.

### Prospects We Should Avoid

ClearData **strongly recommends** that the agent review the prospect pool (Main View) and leave a note or flag any prospects that ClearData should avoid. This might include current customers, known bad risks, etc. It is the agent's responsibility to communicate unwanted prospects to ClearData. Please note that unwanted prospects resulting from a lack of communication from the agent are not eligible for replacement.

### Confirming Appointments

The agent is to call the prospect within 48 hours or according to the special instructions in the "Urgent Appointment Scheduled" email, to introduce themselves and confirm the appointment. If the appointment was scheduled at an inconvenient time, the agent can reschedule the appointment during the confirmation call.

## Appointment Issues

ALL appointment issues are to be communicated to ClearData International within 48 hours of the originally scheduled appointment date and time. Appointment issues are defined as events, outside the agent's control, that prevent the original appointment date and time from being honored and would include, but are not limited to, events such as cancelation and time or date rescheduling. Appointment issues communicated beyond 48 hours of the original appointment date and time will render the appointment ineligible for replacement. If an appointment is rescheduled, it is the responsibility of the agent to notify ClearData International of the new appointment date and time, otherwise the original appointment date and time will be considered.

## Replacement Appointment Criteria

A failed appointment is considered eligible for replacement when **ALL** of the following criteria have been met:

1. The prospect has been contacted within 48 hours or according to the instructions contained within the "Appointment Set" email
2. The agent has spoken directly with the contact named in the email and this contact chose not to honor the original appointment date and time
  - Simply leaving a voice mail or a message with the prospect is not sufficient grounds for returning an appointment as cancelled
  - Questioning a prospect over the phone and mutually determining a meeting is not necessary and will not qualify the appointment for replacement
3. The agent has contacted ClearData within 48 hours of the original appointment date and time and notified ClearData of an issue with the scheduled appointment

***ClearData reserves the right to contact any cancelled appointment in an effort to reschedule the appointment and/or to obtain additional information for future action.***

## Returning a Cancelled Appointment

In all cases, the cancelled appointment must be returned to ClearData via email within 48 hours of the original appointment date and time. Please reply to the original "Urgent Appointment Scheduled" email from ClearData rather than drafting a separate email. Any appointment that has been saved and sent at a later date will not be accepted as cancelled.

## Sharing RelEvent

ClearData and the agent will be working from the same RelEvent system. To avoid any confusion, neither ClearData nor the agent is permitted to contact a prospect that the other is working on.

**Note:** Special circumstances may arise during the agent's engagement with ClearData that are not covered above. ClearData reserves the right to make an equitable decision based on the information available. ClearData also reserves the right to modify and amend the above guidelines at anytime as needed. Proper notification policies will be upheld. The guidelines are nondiscriminatory and apply to all ClearData clientele.

**We thank you for your business!**