

Proposed Contract Renewal / Extension Call Script – Electricity

Outbound Introduction

1. “Good morning / afternoon / evening, my name is [salesperson’s name] and I am calling on behalf of [retailer name]”.
2. “Please can I speak with the electricity account holder”? Y/N

If no - “Please can I speak with / are you the spouse of the account holder”? Y/N

If no – “are you specifically authorized by the account holder to make decisions about the electricity supply for this [residence / premise] on behalf of the account holder”? Y/N

If no, the salesperson may ask the consumer if there is a more convenient time to call, but otherwise the call must be terminated.

Inbound Introduction

1. “Thank you for calling [retailer name], my name is [salesperson’s name]”.
2. “Please can I confirm that you are the electricity account holder”? Y/N

If no - “Are you the spouse of the account holder”? Y/N

If no – “are you specifically authorized by the account holder to make decisions about the electricity supply for this [residence / premise] on behalf of the account holder”? Y/N

If no, the salesperson may indicate to the consumer that he/she does not appear to have the authority to renew/extend the contract, but otherwise the call must be terminated.

All calls

3. “Are you comfortable for this call to proceed in English”? Y/N

If no – “is there someone there who can assist you with speaking English”? Y/N

If no, the call must be terminated. The call must also be terminated if the salesperson knows or ought to know that the consumer is not reasonably able to protect his or her interests by reason of inability to understand English.

4. "This call is being recorded for regulatory and quality control purposes. Do you consent to a recording being made"? Y/N

If no, the call must be terminated.

5. "You are entitled to request a copy of this call recording today or on a later date. I will provide you with the contact details that you may use for that purpose at the end of this call. If you ask for a copy of this call recording, we must send it to you within 10 days of your request".

If the consumer requests a copy of the call recording during the call, the salesperson must inform the retailer of the request.

6. "Today's date is [date]".
7. "The purpose of this call is to see if you want to [renew / extend] your contract with [retailer name] for the provision of your electricity supply and to confirm certain key terms and conditions of the [renewal / extension] offer you recently received from [retailer name]".
8. "[Retailer name] sent you a [renewal /extension] offer on [date]. This [renewal / extension] offer included a copy of your existing contract, a [renewal / extension] form which outlines important information about the [renewal / extension] of your contract and your contract [renewal / extension] options, a disclosure statement and a copy of the new terms and conditions that will apply if you choose to [renew / extend] the contract. Did you receive a copy of the [renewal / extension] offer from [retailer name]"? Y/N

If no, the salesperson may confirm the consumer's name and address details, but otherwise the call must be terminated. No further renewal/extension call may be made until a compliant renewal/extension package has been issued to the consumer and the required 15-day period has elapsed.

9. "Did you read and understand the content of the disclosure statement provided with the [renewal / extension] offer"? Y/N

If no, the call must be terminated.

10. "Do you understand that if you choose to [renew / extend] your contract, [retailer name] will continue to be your electricity supplier? Y/N

11. “Do you understand that [retailer name] is not your local utility, and is not associated with the Ontario Energy Board or the Government of Ontario”? Y/N

If no, the salesperson must explain the independence of the retailer.

12. “The [renewal / extension] of this contract is for a term of [x] years at a price of [price details]”.

13. “Please be aware that you if you cancel this contract more than 14 days after you have [renewed / extended] today, you may have to pay a cancellation fee”.

14. “You should also be aware that energy cost savings under the [renewed / extended] contract are not guaranteed”.

15. “Do you agree to proceed with the [renewal / extension] of your contract with the changes described in the [renewal / extension] offer that [retailer name] provided to you for a term of [x] years at a price of [price details]”? Y/N

If the customer states that they do not wish to renew/extend their electricity contract today as they need more time to make a decision as to whether or not to proceed with the renewal/extension, the call must be terminated.

If the customer states that they do not wish to renew/extend their electricity contract, the call must be terminated and the salesperson must inform the retailer of the customer’s choice not to renew/extend the contract.

16. “I now need to confirm that I have the correct spelling of your name [customer name]”? Y/N

If no, ensure the correct spelling is recorded.

17. “I now need to confirm that I have the correct spelling of your address [customer address]”? Y/N

If no, ensure the correct spelling is recorded.

18. “If you change your mind, you have 14 days from today to notify [retailer name] that you no longer wish to have your electricity contract [renewed / extended]. You will then become a customer of your local utility when your current contract expires and the supply of your electricity will not be interrupted”.

19. “Thank you for your time. If you have questions or you wish to request a copy of the recording of this call, please contact us at the contact information

provided on your [renewal / extension] form. Alternatively you can call us at our toll free number which is [number]”.

20. “You can also obtain further information about contracts, prices and your legal rights and obligations from the Ontario Energy Board by visiting their website or calling their toll-free number. Would you like these contact details”? Y/N

If yes, provide the Board’s contact details.