

## **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. “May I please speak with [account holder name]”? Y/N

If yes – “May I please confirm that you are the electricity account holder”? Y/N

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

If no – “Is there an individual with specific authorization from the account holder who is able to make decisions in regards to the electricity supply for this [residence / business]”? 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. “May I please 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 in regards to the electricity supply for this [residence / business]”? Y/N

If no, the salesperson shall indicate to the consumer that the renewal / extension process cannot proceed because the consumer does not appear to have the authority to renew / extend the contract, and the call must then be terminated.

## All calls

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

If no – “Is there someone present that speaks English and can assist you with this call”? Y/N

If no – “Is there a more convenient time when we can call back when there will be someone that speaks English and can assist you with this call”? Y/N

If yes, the salesperson can confirm the arranged time and end the call thanking the consumer for their time.

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. In this case, before terminating the call the salesperson must explain to the consumer the reason for not proceeding with the renewal / extension process.

4. “Just to let you know, this call is being recorded for regulatory and quality control purposes. Are you comfortable with this call being recorded”? Y/N

If no, the salesperson shall explain to the consumer why the renewal / extension process cannot proceed. The salesperson may ask the consumer if there is a more convenient time to call again, but otherwise the call must then be terminated.

5. “Today’s date is [date]”.

6. “The purpose of this call is to see if you would like to [renew / extend] your contract with [retailer name] for the provision of your electricity supply and to go over certain key terms and conditions of the [renewal / extension] offer you recently received from [retailer name]”.

7. “[Retailer name] sent you a [renewal /extension] offer on [date]. This [renewal / extension] offer included a [renewal / extension] form which outlines important information about the [renewal / extension] of your contract and your contract [renewal / extension] options. This offer also included a disclosure statement, a price comparison document and a copy of the new contract that will apply if you choose to [renew / extend] the contract. Did you receive a copy of the [renewal / extension] offer from [retailer name] containing all of these items”? Y/N

If no, the salesperson may confirm the consumer’s name and address details and must explain to the consumer why the renewal / extension process cannot proceed. The call must then be terminated. No further renewal /

extension call may be made until a compliant renewal / extension package has been issued to the consumer.

8. "Do you understand that if you choose to [renew / extend] your contract, [retailer name] will continue to be your electricity supplier"? Y/N
9. "Do you understand that [retailer name] is not your 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.

10. "Please be aware that if you cancel the [renewed /extended] contract more than 14 days after you have [renewed / extended] today, you may have to pay a cancellation fee".
11. "You should also be aware that energy cost savings under the [renewed / extended] contract are not guaranteed".
12. If multiple renewal price and contract terms were offered – "The renewal offer that [retailer name] sent to you contained [provide consumer with details of renewal offers]. Would you like to proceed with the [renewal / extension] of one of these offers"? Y/N

If yes, the salesperson must ask which offer the consumer wishes to accept if it is not clearly identified by the consumer, and then proceed as follows: "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 a single renewal price and contract term was offered - "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

No – consumer states they want more time - If the consumer 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 salesperson may ask if there is a convenient time when the salesperson may call back but otherwise the call must then be terminated.

No – consumer does not want to renew/extend - If the consumer states that they do not wish to renew / extend their electricity contract, the salesperson may thank the consumer for their time but otherwise the call must be terminated and the salesperson must inform the retailer of the consumer's choice not to renew / extend the contract.

13. "May I please confirm that I have the correct spelling of your name [consumer name]"? Y/N

If no, ensure the correct spelling is recorded.

14. "May I please confirm that I have the correct spelling of your address [consumer address]"? Y/N

If no, ensure the correct spelling is recorded.

15. "For our records, can you please confirm that the best telephone number to reach you is [consumer telephone number]"?

If no, ensure the correct telephone number is recorded.

16. "Please note that 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 utility when your current contract expires and the supply of your electricity will not be interrupted".

17. "You are entitled to request a copy of this call recording today or on a later date. 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.

18. "You can also obtain further information about energy contracts, energy prices and your rights and obligations as an energy consumer from the Ontario Energy Board. Would you like the Ontario Energy Board's website address or toll-free number"? Y/N

If yes, provide the Board's contact details.

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]".

## **Contract Renewal / Extension Call Script – Natural Gas**

### **Outbound Introduction**

1. “Good morning / afternoon / evening, my name is [salesperson’s name] and I am calling on behalf of [gas marketer name]”.
2. “May I please speak with [account holder name]”? Y/N

If yes – “May I please confirm that you are the natural gas account holder”?  
Y/N

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

If no – “Is there an individual with specific authorization from the account holder who is able to make decisions in regards to the natural gas supply for this [residence / business]”? 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 [gas marketer name], my name is [salesperson’s name]”.
2. “May I please confirm that you are the natural gas 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 natural gas supply for this [residence / business]”? Y/N

If no, the salesperson shall indicate to the consumer that the renewal / extension process cannot proceed because the consumer does not appear to have the authority to renew / extend the contract, and the call must then be terminated.

## All calls

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

If no – “Is there someone present that speaks English and can assist you with this call”? Y/N

If no – “Is there a more convenient time when we can call back when there will be someone that speaks English and can assist you with this call”? Y/N

If yes, the salesperson can confirm the arranged time and end the call thanking the consumer for their time.

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. In this case, before terminating the call the salesperson must explain to the consumer the reason for not proceeding with the renewal / extension process.

4. “Just to let you know, this call is being recorded for regulatory and quality control purposes. Are you comfortable with this call being recorded”? Y/N

If no, the salesperson shall explain to the consumer why the renewal / extension process cannot proceed. The salesperson may ask the consumer if there is a more convenient time to call again, but otherwise the call must then be terminated.

5. “Today’s date is [date]”.

6. “The purpose of this call is to see if you would like to [renew / extend] your contract with [gas marketer name] for the provision of your natural gas supply and to go over certain key terms and conditions of the [renewal / extension] offer you recently received from [gas marketer name]”.

7. “[Gas marketer name] sent you a [renewal / extension] offer on [date]. This [renewal / extension] offer included a [renewal / extension] form which outlines important information about the [renewal / extension] of your contract and your contract [renewal / extension] options. This offer also included a disclosure statement, a price comparison document and a copy of the new contract that will apply if you choose to [renew / extend] the contract. Did you receive a copy of the [renewal / extension] offer from [gas marketer name] containing all of these items”? Y/N

If no, the salesperson may confirm the consumer’s name and address details and must explain to the consumer why the renewal / extension process cannot proceed. The call must then be terminated. No further renewal /

extension call may be made until a compliant renewal / extension package has been issued to the consumer.

8. "Do you understand that if you choose to [renew / extend] your contract, [gas marketer name] will continue to be your natural gas supplier"? Y/N
9. "Do you understand that [gas marketer name] is not your 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 gas marketer.

10. "Please be aware that if you cancel the [renewed / extended] contract more than 14 days after you have [renewed / extended] today, you may have to pay a cancellation fee".
11. "You should also be aware that energy cost savings under the [renewed / extended] contract are not guaranteed".
12. If multiple renewal price and contract terms were offered – "The renewal offer that [gas marketer name] sent to you contained [provide consumer with details of renewal offers]. Would you like to proceed with the [renewal / extension] of one of these offers"? Y/N

If yes, the salesperson must ask which offer the consumer wishes to accept if it is not clearly identified by the consumer, and then proceed as follows: "Do you agree to proceed with the [renewal / extension] of your contract with the changes described in the [renewal / extension] offer that [gas marketer name] provided to you for a term of [x] years at a price of [price details]"? Y/N

If a single renewal price and contract term was offered - "Do you agree to proceed with the [renewal / extension] of your contract with the changes described in the [renewal / extension] offer that [gas marketer name] provided to you for a term of [x] years at a price of [price details]"? Y/N

No – consumer states they want more time - If the consumer states that they do not wish to renew / extend their natural gas contract today as they need more time to make a decision as to whether or not to proceed with the renewal / extension, the salesperson may ask if there is a convenient time when the salesperson may call back. If auto renewal is an option the salesperson must also remind the consumer that if they do nothing to either renew / extend or cancel the contract, they will be automatically renewed, but otherwise the call must then be terminated.

No – consumer does not want to renew/extend - If the consumer states that they do not wish to renew / extend their natural gas contract, the salesperson

may thank the consumer for their time but otherwise the call must be terminated and the salesperson must inform the gas marketer of the consumer's choice not to renew / extend the contract.

13. "May I please confirm that I have the correct spelling of your name [consumer name]"? Y/N

If no, ensure the correct spelling is recorded.

14. "May I please confirm that I have the correct spelling of your address [consumer address]"? Y/N

If no, ensure the correct spelling is recorded.

15. "For our records, can you please confirm that the best telephone number to reach you is [consumer telephone number]"?

If no, ensure the correct telephone number is recorded.

16. "Please note that if you change your mind, you have 14 days from today to notify [gas marketer name] that you no longer wish to have your natural gas contract [renewed / extended]. You will then become a customer of your utility when your current contract expires and the supply of your natural gas will not be interrupted".

17. "You are entitled to request a copy of this call recording today or on a later date. 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 gas marketer of the request.

18. "You can also obtain further information about energy contracts, energy prices and your rights and obligations as an energy consumer from the Ontario Energy Board. Would you like the Ontario Energy Board's website address or toll-free number"? Y/N

If yes, provide the Board's contact details.

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]".



## **Contract Renewal / Extension Call Script – Natural Gas and Electricity**

Note: In this script, the term “supplier” is used to refer to the gas marketer / electricity retailer.

### **Outbound Introduction**

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

If yes – “May I please confirm that you are the natural gas and electricity account holder”? Y/N

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

If no – “Is there an individual with specific authorization from the account holder who is able to make decisions in regards to the natural gas and electricity supply for this [residence / business]”? 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 [supplier name], my name is [salesperson’s name]”.
2. “May I please confirm that you are the natural gas and 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 natural gas and electricity supply for this [residence / business]”? Y/N

If no, the salesperson shall indicate to the consumer that the renewal / extension process cannot proceed because the consumer does not appear to have the authority to renew / extend the contract, and the call must then be terminated.

## All calls

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

If no – “Is there someone present that speaks English and can assist you with this call”? Y/N

If no – “Is there a more convenient time when we can call back when there will be someone that speaks English and can assist you with this call”? Y/N

If yes, the salesperson can confirm the arranged time and end the call thanking the consumer for their time.

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. In this case, before terminating the call the salesperson must explain to the consumer the reason for not proceeding with the renewal / extension process.

4. “Just to let you know, this call is being recorded for regulatory and quality control purposes. Are you comfortable with this call being recorded”? Y/N

If no, the salesperson shall explain to the consumer why the renewal / extension process cannot proceed. The salesperson may ask the consumer if there is a more convenient time to call again, but otherwise the call must then be terminated.

5. “Today’s date is [date]”.

6. “The purpose of this call is to see if you would like to [renew / extend] your contract(s) with [supplier name] for the provision of your natural gas and electricity supply and to go over certain key terms and conditions of the [renewal / extension] offer you recently received from [supplier name]”.

7. “[Supplier name] sent you a [renewal /extension] offer on [date]. This [renewal / extension] offer included a [renewal / extension] form / [renewal / extension] forms which outline(s) important information about the [renewal / extension] of your contract(s) and your contract [renewal / extension] options. This offer also included disclosure statements, price comparison documents and a copy of the new contract(s) that will apply if you choose to [renew / extend] the contract(s). Did you receive a copy of the [renewal / extension] offer from [supplier name] containing all of these items”? Y/N

If no, the salesperson may confirm the consumer’s name and address details and must explain to the consumer why the renewal / extension process

cannot proceed. The call must then be terminated. No further renewal / extension call may be made until a compliant renewal / extension package has been issued to the consumer.

8. “Do you understand that if you choose to [renew / extend] your contract(s), [supplier name] will continue to be your natural gas and electricity supplier”?  
Y/N
9. “Do you understand that [supplier name] is not your 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 supplier.

10. “Please be aware that if you cancel the [renewed / extended] contract / these [renewed / extended] contracts more than 14 days after you have [renewed / extended] today, you may have to pay a cancellation fee”.
11. “You should also be aware that energy cost savings under the [renewed / extended] contract(s) are not guaranteed”.
12. If multiple renewal price and contract terms were offered – “The renewal offer that [supplier name] sent to you contained [provide consumer with details of renewal offers]. Would you like to proceed with the [renewal / extension] of one of these offers”? Y/N

If yes, the salesperson must ask which offers the consumer wishes to accept if they are not clearly identified by the consumer, and then repeat for both natural gas and electricity contract offers - “Do you agree to proceed with the [renewal / extension] of your contract with the changes described in the [renewal / extension] offer that [supplier name] provided to you for a term of [x] years at a price of [price details]”? Y/N

If a single renewal price and contract term was offered - “Do you agree to proceed with the [renewal / extension] of your contract with the changes described in the [renewal / extension] offer that [supplier name] provided to you for a term of [x] years at a price of [price details]”? Y/N – repeat for both natural gas and electricity contract offers.

No – consumer states they want more time - If the consumer states that they do not wish to renew / extend their natural gas and electricity contract(s) today as they need more time to make a decision as to whether or not to proceed with the renewal / extension, the salesperson may ask if there is a convenient time when the salesperson may call back. If auto renewal is an option the salesperson must also remind the consumer that in regards to their gas contract only, if they do nothing to either renew / extend or cancel the

contract they will be automatically renewed, but otherwise the call must then be terminated.

Where there is one renewal / extension offer for natural gas and another for electricity and the consumer wishes to defer a decision on one renewal / extension offer only but continue with the call for the other, the salesperson may continue with the call in respect of the renewal / extension for which the consumer is willing to proceed.

No – consumer does not want to renew/extend - If the consumer states that they do not wish to renew / extend their natural gas and electricity contract(s), the salesperson may thank the consumer for their time but otherwise the call must be terminated and the salesperson must inform the supplier of the consumer's choice not to renew / extend the contract(s). Where there is one renewal / extension offer for natural gas and another for electricity and the consumer states that they do not wish to proceed with one of the renewal / extension offers but they wish to proceed with the other, the salesperson may continue the call in respect of the renewal / extension for which the consumer is willing to proceed, and must inform the supplier of the consumer's choice not to proceed with the other renewal / extension.

13. "May I please confirm that I have the correct spelling of your name [consumer name]"? Y/N

If no, ensure the correct spelling is recorded.

14. "May I please confirm that I have the correct spelling of your address [consumer address]"? Y/N

If no, ensure the correct spelling is recorded.

15. "For our records, can you please confirm that the best telephone number to reach you is [consumer telephone number]"?

If no, ensure the correct telephone number is recorded.

16. "Please note that if you change your mind, you have 14 days from today to notify [supplier name] that you no longer wish to have your natural gas and electricity contract [renewed / extended]. You will then become a customer of your utility when your current contract expires and the supply of your natural gas and electricity will not be interrupted".

17. "You are entitled to request a copy of this call recording today or on a later date. 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 supplier of the request.

18. “You can also obtain further information about energy contracts, energy prices and your rights and obligations as an energy consumer from the Ontario Energy Board. Would you like the Ontario Energy Board’s website address or toll-free number”? Y/N

If yes, provide the Board’s contact details.

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]”.