

Commercial Sample Script – I2C

Hi!! This is ABC CORP, right?

Hi there, this is Harvey Specter and I am trying to reach the person in charge of the electric bill for this location. Would that be you? NO / YES

NO: I have an important update regarding utility Seasonal / Variable rates. I can only speak to the person in charge. Can you please transfer the call? I will hold the line for you, thank you.

YES: That's great. This is <agent name> calling on behalf of <supplier name>, a competitive retail electric supplier licensed by the NY Commerce Commission. For quality assurance purposes this call is being recorded. How are you doing today? <wait for response>

Reason for Call

Great! I'm calling to offer you a fixed electricity supply rate through **Supplier** that is currently may be lower than your utility rate.

With a fixed rate, you don't have to worry about your rate changing for the term of your contract – unlike your Utility which is scheduled to change again on a monthly basis or seasonal rate. The best part is you do not need to switch from your current utility company.

I know you weren't expecting my call, please go grab your bill to see if you qualify. Before you do so, can you confirm that you are over the age of 18 and authorized to make changes on your electric account?

Do you already have a supplier or are you with the utility? (Wait for response) Utility: That means I have called you at the right time.

Already with a supplier: Great as you already have a supplier let me see if I can give you a lower rate. Do you have any termination fees under your current contract?

If no: Kindly hold the line and grab a pen and paper. In the meantime, I will pull up the rates for you.

Continue to Rate Presentation.

If Yes: That's fine. Supplier has future rates available until Month, Year.

When does your current supplier contract end? (Take down contract end date/ e.g., Dec 2024)

Since your contract ends in <Month, Year>, I will offer you the rate for <next month, year> so you can lock-in the rate right now. It will take affect **after** your current contract ends so you don't have to pay your current supplier any termination fees.

Kindly hold the line and grab a pen and paper in the mean while I will pull up the rates for you. **Continue to Rate Presentation.,**

"The fixed rate totally depends on your past 12 months historic usage." Higher the usage and Lower is the rate you are qualified for.

What is Supplier & and why do I choose you as a supplier?

The fixed rate totally depends on your past 12 months historic usage.

Supplier is one of the authorized energy suppliers.

- ☐ You are not switching from your current utility
- ☐ Utility will still read your meter; respond to any emergency service you have.
- ☐ You will still receive one single bill from your utility company.
- ☐ There are no Enrollment or Connection fees.
- ☐ It is guaranteed fixed rate
- ☐ We are rated as A+ in BBB.

Feel free to revert back if you have any questions.

Can you please send us a copy of your bill so that we can work out the best rate for your account?

Present Rate

In order to confirm what rate we have available for you and when you can start service, please confirm your last meter read date which can be found on your electric bill. *[Wait for customer to provide]*

Thanks!

Enter the customer's "last meter read date" into the calculator. The calculator will then provide an estimated start date, estimated expiration date and estimated auto-renewal date.

The fixed rate for our Independence plan product is \$X.XXXXX dollars per kWh for XX months for the duration of your contract term. Your start date with Supplier should be on [Month, Day, Year].

This plan doesn't guarantee savings, instead, it protects your business from utility rate fluctuations. As always, your monthly bill may change as a result of your electric usage over time.

May I continue and enroll you in Suppliers Fixed Rate Plan?

If customer declines: If you change your mind, you may contact one of our energy consultants directly at our Suppliers main office. The number is 1-123-456-789. [Politely end sale].

If customer agrees: Continue

Explain Rescission and Early Termination Fee

If you change your mind, you have the right to rescind and/or cancel this agreement. Your right of rescission and early termination fee varies depending on your size.

If your annual usage is 15,000 kWh or less, you may cancel this agreement without penalty within three business working days from the date the Utility processes the enrollment request. After that time, you can contact Supplier at 123-456-7890 to cancel at any time without penalty. You can also call your Utility to cancel at (Utility: 1-123-456- 7890)

If your annual usage is greater than 15,000 kWh, you can cancel this agreement without penalty within three (3) business days of contract execution. After that time, termination fees may apply. Suppliers calculates the Early Termination Fee (ETF) using a formula based on the amount of usage remaining in the agreement:

ETF equals the Remaining Quantity times the greater of:

(a) (Agreement Rate) – (Current Market Rate for energy) or \$0.007.

Explain Delivery Service

Before I go on, I want to be clear that Supplier does not represent your utility, government or consumer groups, in any way. Your utility will continue to deliver the electricity, read your meter and handle your emergency services. They will continue to send your bill, which will include their delivery and any applicable taxes. If you enter into this contract with Supplier you will be changing your retail electric supplier, and you will see Supplier name listed as your electricity supplier on your bill. Okay? *[Pause for confirmation]*

Automatic Contract Renewal Disclosure: READ FULL DISCLOSURE TO CUSTOMER

Please refer to the calculator for this section. The calculator will provide an estimated expiration date and estimated auto-renewal date.

Your new service is estimated to expire on [Month, Day, Year], which could be later based on when the utility

accepts your initial enrollment and future changes to the read schedule of your local utility.

Approximately 30-60 days before your contract term expires, you will receive a contract expiration/renewal reminder from Supplier.

For Small Commercial Customers

If you do not take action prior to the expiration date, your contract will automatically renew on a Fixed Rate Rollover Plan immediately following the last billing cycle of your current term, which we estimate will occur on [Month, Day, Year].

You can cancel the Fixed Rate Rollover Plan without any fee by contacting Supplier toll-free at 1-123-456-7890 POWER99 40 Days before the new contract term begins.

For Commercial Customers (greater than 15,000 kWh):

If you do not cancel service or renew on a new Supplier plan at the end of your Term, service will automatically continue with Supplier on a Rollover Variable rate which will renew monthly unless you or Supplier cancel, upon thirty (30) days written Notice.

Welcome Kit, Utility Confirmation

Upon acceptance of your contract, Supplier will send you a Welcome Letter by mail, along with your Terms

and Conditions and plan details. You will also receive a confirmation notice of the switch directly from your utility. If you have any concerns, you can call the ICC's Consumer Services Division at 1-123-456-7890. For information about the electric supply price of your utility and offers from other retail electric suppliers,

Ask For Additional Accounts

Do you have any other electricity accounts that you'd like to enroll today?

Ask For Questions, Prep for TPV

Okay *[Consumer First Name]*, I know we've covered a lot today. Do you have any questions?

[Allow consumer to respond.] Okay, great!

[Summarize customer of rate, term and start date before TPV]

Again, my name is *[Agent First Name, Last Name]*. *[Provide agent ID if requested by customer.]*

If you need anything in the future, please call our Customer Care team at 1-123-456-7890 You've made an excellent choice, *[customer's name]*! Thank you for choosing Supplier as your business's electricity supplier.

I will send you the docusign papers on your email.