



Utility Advocate Telecom Process & Policies

- 1.** UA Sales Rep presents Telecom marketing flyer to client and asks if they would like to have UA obtain a free cost saving proposal on their behalf. Note that we have been able to find savings for over 85% of the submissions that we have priced.
- 2.** Sales Rep completes UA Telecom Submission Form with the client.
- 3.** UA Sales Rep obtains the client's most recent available Telecom, Internet, Cable, and Satellite bills (all pages).
- 4.** UA Sales Rep emails the Telecom Submission form and the bills to telecom@utilityadvocate.com or faxes them to (203)262-6001 Attn: UA Telecom Proposals.
- 5.** Upon receipt, UA will review for completeness and then forward to CGA for pricing. Note that you will be contacted by UA for complete bills if any pages are missing before UA will submit to CGA or one of our other approved partners.
- 6.** Within 3-5 business days after a complete package has been received, CGA will complete a cost savings proposal and email it to UA.
- 7.** Within 24 hours of a completed proposal, a sales representative from CGA and a UA Customer Relationship Manager will contact your client to make the cost savings proposal directly to them and attempt to close the sale on behalf of the UA sales rep.
- 8.** Upon acceptance from the client, CGA will ask the client to complete an agreement form. Within 5-7 business days after receipt of a completed agreement form, the client will be notified of the installation date.
- 9.** The new telecom supplier will contact the client to schedule an installation date and coordinate the entire transition process with the client.
- 10.** UA will notify the Sales Rep about the closing via a phone call or an email and a CAB will be paid the next appropriate pay period.