

<b>Objection</b>	<b>Rebuttal</b>
Offers	<ul style="list-style-type: none"> <li>• 20% off</li> <li>• Add a month</li> <li>• Downgrade if they don't need all the features</li> </ul>
General Tips	<ul style="list-style-type: none"> <li>• Get the customer talking, even if it isn't about Quicken</li> <li>• Ask them questions and try and find out why they bought Quicken, or where it is falling short</li> <li>• Make it a conversation</li> <li>• The more they speak with you the less likely they are to cancel</li> <li>• Be friendly</li> </ul>
Using home and business and they no longer need to keep track of their rentals, or business	<ul style="list-style-type: none"> <li>• Ask if they use quicken to also track their bank accounts, taxes or reporting <ul style="list-style-type: none"> <li>○ Can downgrade product, or show how to use certain features</li> </ul> </li> <li>• Yes or no offer current discount to see if want to use Quicken with the other features available</li> </ul>
Using their bank apps:	<ul style="list-style-type: none"> <li>• Ask how many bank accounts do they have? Do they have any retirement accounts? <ul style="list-style-type: none"> <li>○ If multiple explain the benefits of seeing them all in one place, track net worth and spending</li> </ul> </li> <li>• If no explain budgets and reports that might not be available with the bank app</li> </ul>
Deluxe and pays for quicken bill pay	<ul style="list-style-type: none"> <li>• Say you can upgrade to premier and give a 10% discount or whatever current promo is <ul style="list-style-type: none"> <li>○ Should be close to same price as lower levels</li> </ul> </li> </ul>

<p>Called in multiple times to get help with issues and hasn't been resolved</p>	<ul style="list-style-type: none"> <li>• Apologize that their issue hasn't been resolved and state that you would be more than happy to fix their issue</li> <li>• Can offer current discount for their trouble as well</li> </ul>
<p>Too Expensive</p>	<ul style="list-style-type: none"> <li>• Ask why they initially bought Quicken and if it is not doing something that they had hoped <ul style="list-style-type: none"> <li>○ If it isn't, see if you can find a way for Quicken to do that thing</li> </ul> </li> <li>• Offer the 10% discount, or current promotion going on</li> <li>• Offer lower product levels that are more affordable</li> </ul>
<p>Don't like subscription</p>	<ul style="list-style-type: none"> <li>• Remind them of the benefits of subscription: not having to convert, latest features and support etc.</li> </ul>
<p>Don't use anymore</p>	<ul style="list-style-type: none"> <li>• What did you use Quicken for?</li> <li>• Are you using another tool to track finances?</li> <li>• Do you use TurboTax for taxes? <ul style="list-style-type: none"> <li>○ If yes, Quicken can export to TurboTax and make taxes easy</li> </ul> </li> <li>• If they are retired and don't use, they can still track their social security, performance of their IRA's or investments and net worth to see how much money they have</li> </ul>
<p>Too hard to use</p>	<ul style="list-style-type: none"> <li>• Say we have free support and 24*7 chat</li> <li>• We are always here to help them work on the program and we can give them a tutorial on how to use and some of our key features that we like now</li> <li>• Be friendly on this one and let them know you are here for them</li> </ul>

Use another product	<ul style="list-style-type: none"> <li>• Ask probing questions</li> <li>• What do you like about that product?</li> <li>• Notate which product they are using</li> <li>• Mention the key benefits of Quicken and features <ul style="list-style-type: none"> <li>○ Support, connectivity, budgets and tracking etc.</li> </ul> </li> </ul>
Use Manually	<ul style="list-style-type: none"> <li>• Support is included for active users</li> <li>• Can't download from the bank and get the latest benefits Quicken has to offer</li> <li>• Can't use mobile or web companion app</li> <li>• Can't get updates and latest features of Quicken</li> </ul>
Offering the discount	<ul style="list-style-type: none"> <li>• Don't make it sound forced</li> <li>• Use phrasing like: "I am authorized to offer you _____ if you would like to continue using Quicken"</li> <li>• I am sorry that you had a bad experience, but I can extend your subscription by __ if you would like to stay with Quicken</li> </ul>