2. Opt-Out Automation Policy

14. Policies · https://clients.financevine.ca/docs/opt-out-automation-policy/

Opt-Out Criteria:

A lead is considered to have withdrawn consent (opted out) only if they meet the following criteria:

1. **Timely Response:** The lead must reply to **FinanceVine**’s initial contact (SMS or email) within **5 minutes** with a clear opt-out message.
2. **Direct Response to FinanceVine:** The opt-out message must be a direct response to **FinanceVine** and not to an agent's reachout.
3. **Clear Opt-Out Intent:** The opt-out message must indicate the lead’s desire to no longer receive communications. Examples of clear opt-out messages include: “No longer interested,” “Unsubscribe,” “Don’t bother,” or similar language.

Agent Responsibilities:

1. **Do Not Engage:** If an agent receives a lead who has opted out, they must **not** contact the lead under **any** circumstances.
2. **Monthly Order Totals:** Leads who have opted out will **not** count toward an agent’s monthly order total.

FinanceVine Responsibilities:

1. **Daily Review: FinanceVine** will review all initial lead responses daily to identify and remove opt-out leads.
2. **Automatic Removal:** Opt-out leads will be automatically removed from agent lead sheets. Deleted from the **ROAS sheet** entirely and marked in red on the **Orders sheet**
3. **Agent Notification:** Agents will not receive any specific notification regarding opt-out leads. Check lead sheets for status updates or reach out to your account manager.

Important Note:

A lead who responds to an agent’s initial contact with a “not interested” message **does not** constitute an opt-out. This is considered a **failed pitch** attempt and does not impact the lead’s consent status.