

License Reduction & Product Cancellation Process

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Overview

This article outlines the process for handling customer requests related to license reductions and product cancellations. It defines customer requirements, internal review and approval procedures, and operational responsibilities for implementing approved changes.

Customer Requirements

All departments must provide customers with the following instructions when requesting a license reduction or product cancellation:

Requests for license reductions and product cancellations must be submitted in writing by an authorized customer contact on company letterhead and emailed to customersuccess@boldgroup.com for evaluation.

Requests for reductions or cancellations may only be processed at the time of contract renewal and must comply with the notice period defined in the customer's Master Services Agreement (MSA) or any applicable special contract terms (typically 90 days).

Requests that do not meet these requirements will be declined.

Process Workflow

Step 1: Customer Submission

The customer submits a written request containing:

- Details of the requested reduction or cancellation provided on company letterhead provided in email by an approved customer contact
- Email submission sent to: customersuccess@boldgroup.com

Step 2: CSM Review

The Customer Success Manager (CSM) is responsible for reviewing:

- Contract renewal timelines

- Applicable notice periods
- Contract terms and conditions
- Eligibility for reduction or cancellation based on the criteria listed above

If the Request Does Not Qualify

If the request falls outside the allowed notice period or renewal timeline:

- The customer is notified that the request is unable to be processed because it falls outside of their contract terms
- The case is closed

If the Request Qualifies

If the request meets all contractual requirements:

- The CCR fields are completed within the case
- Appropriate recommendations are documented
- The request is submitted to Sales Operations (SalesOps) for approval

Step 3: SalesOps Review & Executive Approval

SalesOps reviews the request for:

- Accuracy
- Completeness
- Contract compliance
- Business impact

After review, SalesOps submits the request for internal executive approval.

Approval Process

- Requests are reviewed by the designated Bold executive
- Requests are then escalated to the EverPro executive and legal team for final approval
- Recommendations may either:
 1. Be approved for processing
 2. Be declined

Important Notes

- There is currently no SLA for approval turnaround time
- Approval timelines may vary based on business review requirements

Step 4: Billing & Licensing Changes

If the request is approved:

1. SalesOps informs the Billing Team to make the necessary billing adjustments
2. SalesOps informs the PMO to create a new Professional Services case for the license reduction. The case subject line should include the request and effective date.
3. PMO coordinates the required licensing changes with the designated resource teams

Product & Resource Assignments

The following resources are responsible for implementing approved licensing changes:

Product / Platform	Assigned Resource
AlarmBiller	Valarie Faircloth
Sedona-X (SO)	Assigned AB Resource
Time & Attendance (SO)	Assigned AB Resource
SalesAutomation (SO)	Assigned AB Resource
Managely	Valarie Faircloth
SedonaOffice On-Prem Core Licenses	Valarie Faircloth or Josh Tafoya
SedonaOffice Cloud Core Licenses	Hosted Services
API	Assigned API Resource

Product / Platform	Assigned Resource
Manitou On-Prem	Bill Fox or Josh Tafoya
Manitou Cloud	Hosted Services

Roles & Responsibilities

Customer Success Manager (CSM)

- Review customer requests
- Validate contract timing and notice requirements
- Communicate approval eligibility to customer
- Complete CCR documentation
- Submit qualifying requests to SalesOps

Sales Operations (SalesOps)

- Validate request details
- Coordinate executive approvals
- Notify Billing and PMO upon approval

Billing Team

- Process approved billing changes
- Ensure billing updates align with approved effective dates

PMO / Professional Services

- Create implementation case
- Coordinate licensing updates with assigned resources
- Ensure requested changes are completed accurately

Key Policy Notes

- Reductions and cancellations are only processed at renewal unless otherwise specified in contract terms
- Written requests on company letterhead are mandatory
- Authorized customer contacts are required
- Standard notice period is typically 90 days unless otherwise defined in the MSA
- Requests outside contractual guidelines will be declined
- Approval timing is not governed by an SLA

Related Teams

- Customer Success
 - Sales Operations
 - Billing
 - PMO
 - Professional Services
 - Hosted Services
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